

Waypoint Global Suite Reports User's Guide

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Overview

Suite Reports was created to allow Suite users the ability to run reports in order to view the results obtained in Suite modules so analysis can be conducted to determine the effectiveness and efficiency of processes.

A variety of reports are available including general reports for a more global view and those at a more detailed level, based upon the module. Both typically offer a variety of selectable parameters to refine your report output and the report output can be exported or emailed from within the Suite Reports module.

Available Reports by Module

Audit Manager

Completed Internal Audit Status Report by Audit Number

The Completed Internal Audit Status by Audit Number report prints all audits with a starting date for the audit that falls within the date range you select. The report includes the Audit Number, Audit Title, Audit Date, Audit Status, Lead Auditor Name, Department and Phone Number, Number of Conforming audit questions, number of instances of Minor and Major Nonconformance to audit questions, and Audit Notes for each audit. The report presents the audits sorted by audit number.

Completed Internal Audit Status Report by Auditor

The Completed Internal Audit Status by Auditor report prints all audits with a starting date for the audit that falls within the date range you select. The report includes the Audit Number, Audit Title, Audit Date, Audit Status, and Audit Notes for each audit. The audit information is grouped by Lead Auditor Name and includes the auditor's Department and Phone Number.

Internal Audit CAR Summary Report

The Internal Audit CAR Summary Report by Audit shows a Management Review Summary of CARs by Audit. The information on the report is sorted and grouped by the Audit Number and shows the Audit Title, Audit Date, Audit Status, and Lead Auditor in addition to the Audit Number. For each audit, the report shows the Audit Notes, NC: Type; Department NC/CAR Number, CAR Type (Product, Process or Other), NC Description, CAR Owner, CAR Completion Date, CAR FAA, NC Status, and CAR Comment.

Internal Audit CAR To Do Report

The Internal Audit CAR To Do List by Audit report shows only the open CARs from complete audits. The information on the report is sorted and grouped by the Audit Number and shows the Audit Title, Audit Date, Audit Status, and Auditor in addition to the Audit Number. For each audit, the report shows all audit generated NCs with the NC/CAR Number, CAR Owner, Audit Notes, and NC Status.

Internal Audit History Report by Department

The Internal Audit History Report by Department shows audits that have a Completed Date between the date ranges you select. The report shows all instances of nonconformance created by the audit and their status. The information on the report is initially sorted and grouped by Department to which the instances of Nonconformance are indexed. Then for each Department, the information is grouped by the Audit

Number and shows the Audit Title, Audit Notes, Audit Completed Date, Audit Closed Date, and Auditor in addition to the Audit Number. For each audit, the report shows the NC Description, NC/CAR Number, Current Work Phase, and CA Owner.

Internal Audit History Report by Element

The Internal Audit History Report by Element shows audits that have a Completed Date between the date ranges you select. The report shows all instances of nonconformance created by the audit and their status. The information on the report is initially sorted and grouped by the Element Description to which the instances of Nonconformance are indexed. Then for each Element Description, the information is grouped by the Audit Number and shows the Audit Title, Audit Completed Date, Audit Closed Date, and Lead Auditor. For each audit, the report shows the NC Description, NC/CAR Number, Current Work Phase, and CA Owner.

Internal Audit History Report by Product

The Internal Audit History Report by Product shows audits that have a Completed Date between the date ranges you select. The report shows all instances of nonconformance created by the audit and their status. The information on the report is initially grouped by the Part Number Description to which the instances of Nonconformance are indexed. Then for each Part Number, the information is grouped by the Audit Number and shows the Audit Title, Audit Notes, Audit Completed Date, Audit Closed Date, and Auditor in addition to the Audit Number. For each audit, the report shows the NC Description, NC/CAR Number, Current Work Phase, and CA Owner.

Internal Audit Nonconformance Report by Department

The Internal Audit Nonconformance Report by Department prints all instances of nonconformance for audits with an Audit Completion Date that falls within the date range you select. For each audit, the report shows the Audit Number, Audit Completed Date, Auditor's Name, and NC Description. If the customer runs Corrective Action too, the report also shows the NC/CAR Number, NC Status, and CA Owner (if one is assigned) for each nonconformance. Audit information is grouped by the Department Name to which the instances of Nonconformance are indexed.

Internal Audit Nonconformance Report by Element

The Internal Audit Nonconformance Report by Element prints all instances of nonconformance for audits with an Audit Completion Date that falls within the date range you select. For each audit, the report shows the Audit Number, Audit Completed Date, Auditor's Name, and NC Description. If the customer runs Corrective Action too, the report also shows the NC/CAR Number, NC Status, and CA Owner (if one is assigned) for each nonconformance. The audit information is sorted and grouped by the Element Number and Description to which the instances of Nonconformance are indexed.

Internal Audit Nonconformance Report by Product

The Internal Audit Nonconformance Report by Product prints all instances of nonconformance for audits with an Audit Completion Date that falls within the date range you select. For each audit, the report shows the Audit Number, Audit Completed Date, Auditor's Name, and NC Description. If the customer runs Corrective Action too, the report also shows the NC/CAR Number, NC Status, and CA Owner (if one is assigned) for each nonconformance. The audit information is grouped by the Product Name to which the instances of Nonconformance are indexed.

Internal Audit Schedule Report

The Internal Audit Schedule report prints all audits that are either scheduled or in process but not yet complete. Audits are printed in order of their start date. For each audit, the report shows the Audit Number, Audit Title, Audit Date, and Audit Status. Also listed are all auditors assigned to the audit and all listed audit participants, along with the department and phone numbers for each one.

Corrective Action

Audit Log

If you enable auditing for Corrective Action documents under Corrective Action's System preferences, an audit log will be available. The audit log lists basic information including NC/CAR/PAR Number, Event Date, Audit Type, User, Workstation, Audit Comment, and Title. The user can optionally choose to look for a specific document number, workstation, type, or user to simplify the results.

Corrective Action Inactivity Report

This report provides a listing of NCs/CARs/PARs that have not had any activity (i.e. work done) since the date specified. That date is entered when the report is generated. Information in this report includes: Title Description, Owner, FAA, Modified date, Last Remark Sent To and Last Remark.

Corrective Action Management Review Report

This report provides a high-level overview for all open and complete NCs/CARs/PARs. Information in this report includes: Title, Description, Date Found, Status, Corrective Actions Taken (by whom & when) and Preventive Actions Taken (by whom & when).

Corrective Action Summary Report

This report provides a summary for all open and complete NCs/CARs/PARs. Information in this report includes: Title, Description, Owner, FAA, Source, Part Number and Traceability.

Detail Data Export

This report was specifically designed for export only. The information you can export includes the following fields in this order: NC/CAR/PAR Number, Owner, FAA, Date Found, Date Modified, Source, Type, Customer Name, Supplier Name, Facility, Audit Number, Part Number, Traceability, Department, Status, and Description. Export formats were covered earlier in the workbook.

NC/CARs Status by Date Found

The report lists basic information including NC/CAR/PAR Number, Work Phase, CAR FAA, CA Owner, source, Facility, Type, Date NC Found, PA Owner, Date CA Completed and brief NC description. The CARs displayed on the report are dependent upon the date range and CAR Status (open, complete, closed) selected.

NC/CARs Status by Most Recent Activity

This report displays any NCs and CARs that have undergone any activity during the specified date range. It lists basic information including NC/CAR/PAR Number, Work Phase, CAR FAA, CA Owner, source, Type, Date NC Found, Facility, PA Owner, Date CA Completed and

brief NC description. The NC/CAR/PARs displayed on the report are dependent upon the date range and CAR Status (open, complete, closed) selected.

NC/CARs by Source

The report lists basic information including NC/CAR/PAR Number, Work Phase, CAR FAA, CA Owner, source, Type, Date NC Found, PA Owner, Date CA Completed and brief NC description. The CARs displayed on the report are dependent upon the source selected.

NC/CAR/PAR by Customer

The report lists basic information including NC/CAR/PAR Number, Work Phase, CAR FAA, CA Owner, source, Type, Date NC Found, PA Owner, Date CA Completed and brief NC description. The CARs displayed on the report are dependent upon customer selected.

NC/CAR/PAR by Department

The report lists basic information including NC/CAR/PAR Number, Work Phase, CAR FAA, CA Owner, source, Type, Date NC Found, PA Owner, Date CA Completed and brief NC description. The CARs displayed on the report are dependent upon the department selected.

NC/CAR/PAR by Facility

The report lists basic information including NC/CAR/PAR Number, Work Phase, CAR FAA, CA Owner, source, Type, Date NC Found, PA Owner, Date CA Completed and brief NC description. The CARs displayed on the report are dependent upon the facility selected.

NC/CAR/PAR by Part Number

The report lists basic information including NC/CAR/PAR Number, Work Phase, CAR FAA, CA Owner, source, Type, Date NC Found, PA Owner, Date CA Completed and brief NC description. The CARs displayed on the report are dependent upon the part number or process selected.

NC/CAR/PAR by Supplier

The report lists basic information including NC/CAR/PAR Number, Work Phase, CAR FAA, CA Owner, source, Type, Date NC Found, PA Owner, Date CA Completed and brief NC description. The CARs displayed on the report are dependent upon the supplier selected.

NC/CAR/PAR by Traceability

The report lists basic information including NC/CAR/PAR Number, Work Phase, CAR FAA, CA Owner, source, Type, Date NC Found, PA Owner, Date CA Completed and brief NC description. The CARs displayed on the report are dependent upon the supplier selected.

PAR by Date Found

The report lists basic PAR information including Number, Work Phase, CAR FAA, CA Owner, source, Type, Date NC Found, PA Owner, Date CA Completed and brief NC description. The

PARs displayed on the report are dependent upon the date range and PAR Status (open, complete, closed) selected.

PAR by Most Recent Activity

The report lists basic PAR information including Number, Work Phase, CAR FAA, CA Owner, source, Type, Date NC Found, PA Owner, Date CA Completed and brief NC description. The PARs displayed on the report are dependent upon the date range and CAR Status (open, complete, closed) selected.

Desktop Reports

Approval Route History by Number (and Title)

For each selected document, the Document Number and Title are listed. Additionally, each Document Revision is presented including the Revision Number, Document Owner, FFA, and Revision Status. The documents are sorted by Document Number (or Title). The Route History is shown including the “Routed By” and “Return To” User Ids, Start and Return Dates, Route Order, Return Conditions, Route Status when the report was run and the Route Comment. Each route participant’s User ID is listed along with the date they received notification, the date they viewed the document, the Action they took and the date of that action and their returning comment. The Final Disposition Comment is displayed for each route.

Approval Routes in Process by Title (and Number)

This report lists each document which is currently in an approval or comment route. The documents are sorted by title or number. The report also includes the following information: Document Title, Number, Revision of the document being routed, Route Start Date, who began route, whom route ends with, route Completion Type, Sequence Type, Route Comment, Route Participants, Date Notified, Date Viewed, Action Taken, Date Resolved, and Route Comment.

Approved Revisions' Scheduled Release Dates by Date (by Number and by Title)

All three reports display documents that have been approved for release but have not yet reached the assigned release date. The report includes the following information: Document Title, Number, Document Description, Revision Number, Document Owner, the date the document is scheduled to go current, and the Revision Description.

Assigned Document Access by User

This report is grouped by user ID. Documents that each user has assigned or default access are listed by name along with the Document Owner and the Assigned and Default document access rights granted.

Current Document Number (and Title) Usage by User

This report shows each user and the documents they have viewed. The report also includes the following information: Document Number and Title, Revision Number, Release Date, how many times the user has viewed the document, and the dates of first and last viewings.

Current Revisions Scheduled Expiration Dates by Date (by Number) (by Title)

This report lists documents that have scheduled expiration dates. The reports are sorted by expiration date, number, or title depending on report run. The report also includes the following information: Document Title, Number and Document, Revision Number, Document Owner, the date the document is scheduled to expire, and the Revision Description

Current Usage by User by Document Number (or Title)

This reports lists user selected documents sorted by number (or title). The report also includes the following information: Document Number, Title, Current Revision Number, and Release Date. Additionally, all users who have accessed the document are listed by their user ID along with the number of times they have Viewed, Copied, or Used the document. Total usage in all three categories for each document is also shown.

Current Usage Count by Document Number (and Title)

This report shows user selected documents listed by document number (or Title). The report also includes the following information: Current Revision level & Release Date. Additionally, the number of times the document has been Viewed, Copied, or Used is also shown along with a total usage figure.

Deleted Documents by Title

This report displays documents deleted within a selectable date range. Results include the document title, number revision and the date the document was deleted.

Disk Space by Document

This report lists all documents with Title, Number, and Owner ID. Each revision is listed with revision number, status, repository name, and file size. Totals for number of revisions, disk space consumed, and bytes consumed by expired or superseded revisions are displayed for each document. Grand totals for all documents are shown at the end of the report including the number of zero byte files and also the number and size of deleted files in the purge table.

Disk Space by Repository

This report is sorted by Repository Name and lists all documents in each repository. The report also includes the following information: Document Title, Number, and Owner. Each revision is shown with Revision Number, Status, and File Size, Total Bytes for each document and total of non-current revision size is presented, Repository Subtotals and Report Grand Totals of Disk Space, number of documents and number of purged files are given.

Document Access by Number (by Title and by User)

This report lists user selected documents by number (or title). The report also includes the following information: Document Number, Title, Owner, Current Revision Number, and Default Access. Additionally, each user and/or group with assigned access rights is listed in User/group ID order along with the assigned rights for the document.

Document Final Approval Authority (User) by Index Topic and Item

Lists the document number and title by each item topic for each User.

Document Filters

This report lists all user selected document filters sorted by Filter Name. The report also includes the following information: All Topic and Item pairs that make up the filter.

Document Number (Title) Revisions by Repository

This report lists user selected Repository Names along with Type, Directory Path and URL path. The following options are shown: Encryption enabled, Compression enabled, can Security be overridden, Check-in Check-out supported. All Documents in the repository are listed in number (title) order along with the current revision number. Totals for each repository includes number of documents, number of revisions and disk space consumed.

Document Numbers (Titles) by Final Approval Authority

This report lists each selected FAA in order, along with each document for which that user is the FAA. The report also includes the Document Number, Title, Current Revision Number, Default Access and Document Description.

Document Numbers (Titles) by Index Item

This report lists selected index items and all documents with Number and Title that are indexed by that item. The Total number of documents for each item is also shown.

Document Numbers (Titles) by Index Topic

This report lists all selected Index Topics in order, along with all documents by number and title, which are indexed to that topic. Total number of documents in each topic is also given.

Document Numbers (Titles) by Item by Topic

This report lists selected index topics then all index items within those topics. Under each item are listed all documents with number and title which are indexed by that

topic/item pair.

Document Numbers (Titles) by Owner

This report lists all documents owned by the selected user(s). Owners are listed in alpha/numeric order by USER ID. Within each Owner group the documents are listed alpha/numerically by TITLE. The report allows users, with MASTER privilege, to select one or more document owners from a user list before the program runs. Users without MASTER privilege will only see documents that they own listed on the report. The document information presented includes: Document Title, Number, Description, Current Revision Number and Default Access Granted.

Documents Removed from the Master List sorted by Date (by Number) (by Title)

This report lists all documents removed from the master list between two dates defined by the user. Document information printed includes Number, Title, Revision and Expired Date. The documents are sorted by Date, Number, or Title, depending on the report run.

Document Type List

This report lists all document types that are currently defined. It groups Public types first, followed by User Defined types, and finally the Workstation Defined types. Document type name, flag information for Editor Defined and Viewer Defined and which viewer to use (defined or internal) as well as the file extensions the document type supports are all presented.

Document Types Detail

This report shows the Doc Type Name and extensions associated with it. Additionally, this report also includes all detail values for user selected document types, including all editor and viewer programs and paths to use for working directories and all flag able values including Validate file before viewing, View only Viewer, Use internal viewer if supported, Compression File Type, Compression Method and Allow Override of Compression Attributes in Catalog Entries.

Documents in Need of Review by Owner

This report lists all documents that have passed their Scheduled Review Date. This report is sorted by document owner. The Document information includes the Title, Number, Revision Number, Review Start Date, Scheduled Review Date, Last Review Date, and Release Date.

Documents In Route By (route) Participant

Lists the document number, title, revision number, who it's routed by, who it returns to, the route start date, the route comment, the notified date, the view date, the action the user took, the date it was resolved, their comment, what type of completion of the route, sequence type of the route, for each User.

Documents Not Stored in a Repository by Number (by Title)

This report lists the Document Number, Title, Revision, Owner, Status, Description, and path to file for all documents not stored in a controlled or uncontrolled repository directory.

Document Owner by Index Topic and Item

Lists the document number and title by each index topic and item for each User.

Documents Referenced By

This reports lists the Document Title for each of the user selected documents and then lists the Document Title and Number of any documents that reference the original document. The total number of referencing documents is also presented.

Documents with no Revision History by Number (by Title)

Documents that only have a single revision are listed with the following information: Document Number and Title, Owner, FAA, Default Access, Document Description, Status, Revision Number and Description.

Electronic Distribution Lists

Each defined Electronic Distribution List Name is given along with all the members on that list. The member information includes: User ID, Full Name, Title, Company, and Department.

Electronic Distributions by Document Number (Title)

This report lists Internal Electronic Distributions Lists sorted by Revision for the selected documents. For each Document Revision, the following information is included: Document Number, Title, Revision Number, and Status. For each Revision, each member's User ID of the E-Distribution List is given along with their Full Name, Title, Department, and Company.

Electronic Signature Audit Log

This report lists all electronic signatures provided by any user on any document within a selectable date range.

Electronic Usage Deficiency by Number (by Title)

This report lists each user selected document along with Number, Title, Current Revision Number, and Effective Date. Then each user who is on the document's Electronic Distribution List, but who HAS NOT viewed the document since its release is shown along with their Full Name, Title, Company, and Department.

Index Items (Topics)

A simple list of all currently valid Index Items (or Topics) in the system.

Index Items by Topic

Each selected Index Topic is listed in alphanumeric order, followed by all the Index Items that are attached to that topic.

Index Topics & Items by Document Number (Title)

User selected documents are listed with Document Number, Title and Current Revision. Then each Topic/Item pair used to index that document is listed.

Master List by Document Number (Title) (Release Date)

All documents identified as Master List candidates are listed with Number, Title, Release Date, and Revision Number. The sort order depends on which report is run. The total number of listed documents is given at the end of the report.

Overdue Paper distributions by Number (Title)

The user selected documents are listed, showing the Document Number and Title. If personnel on the paper distribution list for this document revision have not yet received a copy, they are listed with user ID, Full Name, Company, Department, Title, the Issue Date, and Return Date of the most recent copy that they have.

Paper Distribution Deficiency by Number (Title)

This report lists all documents that have paper copies that have NOT been returned by their user even though the document has been superseded or expired.

Paper Distribution Lists

This report lists all defined paper distribution lists and shows all personnel who are members of each list with their User ID, Full Name, Title, Company, Department, and User Comments.

Paper Distributions by Document Number (Title)

For selected documents the report lists the Document Number, Title, each revision based Paper Distribution List, the personnel who are members of these lists along with their User ID, Full Name, Company, Department, and Title. The Issue Date, Return Date for each revision, and the Issue Number are also shown.

Personnel Pool Information (User)

Information on all the Users in the personnel pool.

Privileges by User

For selected users, the report lists the User ID, Full Name, Department, and lists all the effective Access Privileges that have been granted to the user.

Privileges by User Group

This report presents selected User Groups along with the Access Privileges which have been assigned to those groups.

Registered Documents by Number (Title)

For all documents that the user has view or better access to, the report shows the Document Number, Title, Description, Current Revision Number, Owner and Default Access. Depending on which report is run, this report is sorted by Number or Title.

Registered Numbers (Titles) by Repository

For selected repositories, the report presents the Repository Name followed by each document with Number, Title, Current Revision, Owner, Default Access, and Description.

Related Documents

This report shows all selected document Titles and the Title and Number of all documents related to them.

Repositories

For selected repositories, the report lists the Repository Name, Type, and Directory Path. The report also shows the values of the Security Override, Encryption Enabled, Compression Enabled, and Check in-Check out supported flags.

Repositories with Users

For selected repositories, the report gives the Repository Name, Type, Directory Path and the following flag settings: Security Override, Encryption Enabled, Compression Enabled, and Check in-Check out supported. Additionally, the report lists all IDs of users who have access to this repository.

Review Summary by Document Number (Title)

For selected documents which are current, the report shows the following information: Document Number, Title, Revision Number, Owner, Release Date, Review Frequency, Review Start Date, Last Review Date, Next Scheduled Review Date, Review Notify Date, person who last reviewed the document, the review log, and if next review date should be calculated upon release.

Revision History by Document Number (Title)

For Selected documents, the report shows the following information: Document Number, Title, Current Revision Number and how the history is maintained. For each revision of the document, the Revision Number and Status is shown along with the following as appropriate: Checked-Out Date, Checked-In Date, Route Started Date, Returned Date, Approval Date, Scheduled Release Date, Actual Release Date, Scheduled Expiration Date, Date Rescinded, Date Expired, and Date Superseded.

Routing Lists

For selected defined Route Lists, the report shows the Route List Name, and Sequencing and Completion Types. Then all Route Participants are listed by User ID with their Full Name and Department. If the route has a sequential order, the Order Sequence is displayed and used to sort the list of participants.

Scheduled Reviews by Document Owner (by Review Date)

For selected Document Owners and between selected dates, the reports shows the Owner ID and each document that is scheduled for review. The document information includes Title, Number, Revision, Scheduled Review Date, Review Start Date, Last Review Date, and Release Date.

Total Document Number (Title) Usage by User

For the selected Users and Documents, the report lists the User ID along with all the documents that user has viewed. The document information includes Title, Number, Revision, Release Date, View Count, and First and Last Viewed Dates.

Total Usage by User by Document Number (Title)

For the selected documents, the report shows the Document Number and Title. Then for each revision of the document, the report shows the Revision Number, Release Date, and each user who has accessed the revision. Additionally, the number of times the revision was Viewed, Copied, or Used is also listed for each user as well as Total Usages for each revision and for the document as a whole.

Total Usage Count by Document Number (Title)

For selected documents, the report shows the Title and Number followed by the Total Usage Count for Viewing, Copying, and Using each document.

User Groups

This report creates a simple list of all User Group Names sorted alphanumerically.

User Groups by Privilege

For selected Privileges, the report prints the Privilege Title and all the User Group Names that are assigned that privilege.

User Groups by User

For selected Users, the report shows the User ID followed by a list of all the User Groups that the user is a member of.

Users and User Group lists are presented in alphanumeric order.

User List

This report generates an alphanumeric sorted list of the User ID, Full Name, Company, Department, Title, and Last Login Date.

Users by Privilege

For selected privileges, the report presents the Privilege Name and then lists all Users who have been assigned that privilege. The Privileges and Users are arranged alphanumerically.

Users in User Groups

For selected groups, the report shows the Group Name followed by all the User IDs of group members.

Folio Manager

Active Edit Routes

The Active Edit Routes report lists all of the Edit Routes in Folio Manager that are currently Active. For each Edit Route, it lists the following: the Number, the Title of the Folio, the Due Date of the Edit Route, and the participants involved. Each participant is listed as their Username, along with the Activated Date and the Total Time.

Edit Routes Audit Log

If auditing is enabled in Folio Manager, the Edit Routes Audit Log will keep track of every Edit Route in the module and is sorted by Folio Title. For each Folio Title, it lists the following: the Audit Type, the Event Date and Time, the User, the Workstation the User was using, and the Audit Comment. After each Folio, the report will list the Total Number of Audits for that Folio. At the bottom of the report, the Total Number of Audit Types, the Total Number of Audits, and the Total Number of Users are listed.

Edit Routes

The Edit Routes report lists each Edit Route in the Folio Manager module, sorted by Folio Title. For each Folio, the following is listed: Number, Title, Due Date, Owner, Revision, Status, Checked-Out By, State, Start Date, End Date, and Current Member. Then a list appears below of each user involved in the Edit Route. The list shows the following: Name, Type, Is Active, Activated Date, Total Time, Initial Check-Out, Checked-Out, Checked-In, Last Check-in, and Comment.

Instruction Writer

Current List

The Current List shows all Current (Released) documents for the Authoring Tool that you are currently using. The Current List is sorted by Document Number. Information presented for each document is the document number, title, revision number of released document and the release date.

Instructions Approval Records

The Approval Record lists all revisions for the document currently being displayed and presents Routing information for each revision routed for approval.

Document information header includes: Document number, Title, Revision version routed, Owner, Revision status, and Final Approval Authority.

Each Revision Route information header includes: Routed by, Returned to, Route order (Parallel or Serial), Start date, Return date, Return condition (all users or first rejection), Route status, and Route comment when provided.

Each route participant is listed with the following information: Participant, Date notified, Date viewed, Action taken (approved, rejected), Date resolved, and a Disposition comment. The Final Disposition Comments appear at the bottom of the report.

Instructions by Element

The Instructions by Responsibility Code report provides a list, selectable by standard, of responsibility codes who are listed as having responsibility for the document(s) displayed.

Document information includes: Document number and Title, with a total number of documents displayed for the responsibility code. A summary displays the total number of documents with the code and the total number of responsibility codes with an assignment.

Instructions by Gage

The Instructions by Gage report provides a list, selectable by standard, of gages who are listed as having a gage assigned for the document(s) displayed. Multi-gage selection is supported.

Document information includes: Document number and Title, with a total number of documents displayed for the gage. A summary displays the total number of documents with the gage and the total number of gages with an assignment.

Instructions by Material

The Instructions by Material report provides a list, selectable by standard, of materials who are listed as having a material assigned for the document(s) displayed. Multi-material selection is supported. Document information includes: Document number and Title, with a

total number of documents displayed for the material. A summary displays the total number of documents with the material and the total number of materials with an assignment.

Instructions by Record

The Instructions by Record report provides a list, selectable by standard, of records who are listed as having a record assigned for the document(s) displayed. Multi-record selection is supported. Document information includes: Document number and Title, with a total number of documents displayed for the record. A summary displays the total number of documents with the record and the total number of records with an assignment.

Instructions by Responsibility Code

The Documents by Responsibility Code report provides a list, selectable by standard, of responsibility codes who are listed as having responsibility for the document(s) displayed. Document information includes: Document number and Title, with a total number of documents displayed for the responsibility code. A summary displays the total number of documents with the code and the total number of responsibility codes with an assignment.

Instructions by Safety Instruction

The Instructions by Safety Instruction report provides a list, selectable by standard, of safety instructions who are listed as having a safety instruction assigned for the document(s) displayed. Document information includes: Document number and Title, with a total number of documents displayed by the safety instruction. A summary displays the total number of documents with the safety instruction and the total number of safety instruction with an assignment.

Instructions by Tools

The Instructions by Tools report provides a list, selectable by standard, of tools who are listed as having a tool assigned for the Instruction(s) displayed. Instruction information includes: Document number and Title, with a total number of documents displayed for the tool. A summary displays the total number of instructions with the tool and the total number of tools with an assignment.

Instructions Release History

The Release History Report lists all releases for the document currently being displayed. This report is sorted by revision number in reverse order (newest first). The Document header information includes: Document title, Document number, Current revision number, and the revision retention status selected for the document.

For each release on file, the following information is shown: Revision number, Revision status, Revision description, Release Comment, Date approved & by whom, Date made current, and the Date superseded.

Instructions Review Summary

The Review Record prints the document review summary information for the current revision of the document currently being displayed. The report is sorted by revision number in reverse order (newest first).

Document information includes: Document number, Title, Current revision number, Review every XX days for a Period of YY days, Recalculate review date flag, Next review start date, Last review date, Scheduled review date, Review notify date, Last reviewed by user name, and Review log entries.

Instructions Revision History

The Revision History Report lists all revisions for the document currently being displayed. This report is sorted by revision number in reverse order (newest first). The Document header information includes: Document number, Title, Current revision number, Revision retention status selected for the document.

For each revision on file, the following information is shown: Revision level, Revision status, Revision Description, Release Comments, Checked Out Date & By Whom, Checked In Date & By Whom, Date approved & by Whom, and the Date made current & by Whom.

Instructions Route List

The Route List prints the list of individuals who are on the approval/comment route for the document currently being displayed. Document information includes: Document number, Title, Revision level, Revision status, Owner, Final Approval Authority, Route status, Route Order, and the Return condition.

Route information header includes: Routed by, Returned to, Route order (Parallel or Serial), Start date, Return date, Return condition (all users or first rejection), Route status, and Route instructions. Route Participant information includes: User name, Full name, and Department.

Instruction Paper Distribution List

The Paper Distribution List shows all of the members on the paper distribution list for the document currently being viewed with their Logon Name, Full Names, Title, Company, Department, and Comments. List is sorted by Logon name.

Instructions Paper Distribution Records

Paper Distribution Records lists paper distribution list for all revisions for the document currently being displayed. The report is sorted by revision number in reverse order (newest first). The report shows: Document number, Title, Then, by revision, it lists all of the members on each paper distribution list with their: User name, Full names, Title, Company, Department, Date issued, # Copies issued, Issue number (if any), and the Date returned (for expired or superseded docs).

Instruction Route Cover Sheet

The Route Cover Sheet lists the Route participants for the document currently being displayed. This report provides boxes for an approval or rejected checkmark and the participant's signature. The cover sheet also shows: Document number, Title, Revision number being routed, Document owner, and to whom to return it too (FAA).

Policy Writer

Policy Current List

The Current List shows all Current (Released) documents for the Authoring Tool that you are currently using. The Current List is sorted by Document Number. Information presented for each document is the document number, title, revision number of released document and the release date.

Policy Manuals Approval Records

The Approval Record lists all revisions for the document currently being displayed and presents Routing information for each revision routed for approval.

Document information header includes: Document number, Title, Revision version routed, Owner, Revision status, and Final Approval Authority.

Each Revision Route information header includes: Routed by, Returned to, Route order (Parallel or Serial), Start date, Return date, Return condition (all users or first rejection), Route status, and Route comment when provided.

Each route participant is listed with the following information: Participant, Date notified, Date viewed, Action taken (approved, rejected), Date resolved, and a Disposition comment.

The Final Disposition Comments appear at the bottom of the report.

Policy Manuals Paper Distribution List

The Paper Distribution List shows all of the members on the paper distribution list for the document currently being viewed with their Logon Name, Full Names, Title, Company, Department, and Comments. List is sorted by Logon name.

Policy Manuals Release History

The Release History Report lists all releases for the document currently being displayed. This report is sorted by revision number in reverse order (newest first). The Document header information includes: Document title, Document number, Current revision number, and the revision retention status selected for the document.

For each release on file, the following information is shown: Revision number, Revision status, Revision description, Release Comment, Date approved & by whom, Date made current, and the Date superseded.

Policy Manuals Review Summary

The Review Record prints the document review summary information for the current revision of the document currently being displayed. The report is sorted by revision number in reverse order (newest first).

Document information includes: Document number, Title, Current revision number, Review every XX days for a Period of YY days, Recalculate review date flag, Next review start date, Last review date, Scheduled review date, Review notify date, Last reviewed by user name, and Review log entries.

Policy Manuals Revision History

The Revision History Report lists all revisions for the document currently being displayed. This report is sorted by revision number in reverse order (newest first). The Document header information includes: Document number, Title, Current revision number, Revision retention status selected for the document.

For each revision on file, the following information is shown: Revision level, Revision status, Revision Description, Release Comments, Checked Out Date & By Whom, Checked In Date & By Whom, Date approved & by Whom, and the Date made current & by Whom.

Policy Manuals Route List

The Route List prints the list of individuals who are on the approval/comment route for the document currently being displayed. Document information includes: Document number, Title, Revision level, Revision status, Owner, Final Approval Authority, Route status, Route Order, and the Return condition.

Route information header includes: Routed by, Returned to, Route order (Parallel or Serial), Start date, Return date, Return condition (all users or first rejection), Route status, and Route instructions.

Route Participant information includes: User name, Full name, and Department.

Policy Manuals Paper Distribution Records

Paper Distribution Records lists paper distribution list for all revisions for the document currently being displayed. The report is sorted by revision number in reverse order (newest first). The report shows: Document number, Title, Then, by revision, it lists all of the members on each paper distribution list with their: User name, Full names, Title, Company, Department, Date issued, # Copies issued, Issue number (if any), and the Date returned (for expired or superseded docs).

Policy Route Cover Sheet

The Route Cover Sheet lists the Route participants for the document currently being displayed. This report provides boxes for an approval or rejected checkmark and the participant's signature. The cover sheet also shows: Document number, Title, Revision number being routed, Document owner, and to whom to return it too (FAA).

Procedure Writer

Procedures Current List

The Current List shows all Current (Released) documents for the Authoring Tool that you are currently using. The Current List is sorted by Document Number. Information presented for each document is the document number, title, revision number of released document and the release date.

Procedures Paper Distribution Records

Paper Distribution Records lists paper distribution list for all revisions for the document currently being displayed. The report is sorted by revision number in reverse order (newest first). The report shows: Document number, Title, Then, by revision, it lists all of the members on each paper distribution list with their: User name, Full names, Title, Company, Department, Date issued, # Copies issued, Issue number (if any), and the Date returned (for expired or superseded docs).

Procedures Approval Records

The Approval Record lists all revisions for the document currently being displayed and presents Routing information for each revision routed for approval.

Document information header includes: Document number, Title, Revision version routed, Owner, Revision status, and Final Approval Authority.

Each Revision Route information header includes: Routed by, Returned to, Route order (Parallel or Serial), Start date, Return date, Return condition (all users or first rejection), Route status, and Route comment when provided.

Each route participant is listed with the following information: Participant, Date notified, Date viewed, Action taken (approved, rejected), Date resolved, and a Disposition comment.

The Final Disposition Comments appear at the bottom of the report.

Procedures by Element

The Procedures by Responsibility Code report provides a list, selectable by standard, of responsibility codes who are listed as having responsibility for the document(s) displayed.

Document information includes: Document number and Title, with a total number of documents displayed for the responsibility code. A summary displays the total number of documents with the code and the total number of responsibility codes with an assignment.

Procedures by Record

The Procedures by Record report provides a list, selectable by standard, of records who are listed as having a record assigned for the document(s) displayed. Multi-record selection is supported.

Document information includes: Document number and Title, with a total number of documents displayed for the record. A summary displays the total number of documents with the record and the total number of records with an assignment.

Procedures by Responsibility Code

The Documents by Responsibility Code report provides a list, selectable by standard, of responsibility codes who are listed as having responsibility for the document(s) displayed. Document information includes: Document number and Title, with a total number of documents displayed for the responsibility code. A summary displays the total number of documents with the code and the total number of responsibility codes with an assignment.

Procedures Paper Distribution List

The Paper Distribution List shows all of the members on the paper distribution list for the document currently being viewed with their Logon Name, Full Names, Title, Company, Department, and Comments. List is sorted by Logon name.

Procedures Release History

The Release History Report lists all releases for the document currently being displayed. This report is sorted by revision number in reverse order (newest first). The Document header information includes: Document title, Document number, Current revision number, and the revision retention status selected for the document.

For each release on file, the following information is shown: Revision number, Revision status, Revision description, Release Comment, Date approved & by whom, Date made current, and the Date superseded.

Procedures Review Summary

The Review Record prints the document review summary information for the current revision of the document currently being displayed. The report is sorted by revision number in reverse order (newest first).

Document information includes: Document number, Title, Current revision number, Review every XX days for a Period of YY days, Recalculate review date flag, Next review start date, Last review date, Scheduled review date, Review notify date, Last reviewed by user name, and Review log entries.

Procedures Revision History

The Revision History Report lists all revisions for the document currently being displayed. This report is sorted by revision number in reverse order (newest first). The Document header information includes: Document number, Title, Current revision number, Revision retention status selected for the document.

For each revision on file, the following information is shown: Revision level, Revision status, Revision Description, Release Comments, Checked Out Date & By Whom, Checked In Date & By Whom, Date approved & by Whom, and the Date made current & by Whom.

Procedures Route List

The Route List prints the list of individuals who are on the approval/comment route for the document currently being displayed. Document information includes: Document number, Title, Revision level, Revision status, Owner, Final Approval Authority, Route status, Route Order, and the Return condition.

Route information header includes: Routed by, Returned to, Route order (Parallel or Serial), Start

date, Return date, Return condition (all users or first rejection), Route status, and Route instructions.

Route Participant information includes: User name, Full name, and Department.

Procedure Route Cover Sheet

The Route Cover Sheet lists the Route participants for the document currently being displayed.

This report provides boxes for an approval or rejected checkmark and the participant's signature.

The cover sheet also shows: Document number, Title, Revision number being routed, Document owner, and to whom to return it too (FAA).

Quality Planner

APQP Design Project Document List

The APQP Design Project Document List report presents a list of all project documents for an APQP Design project in Quality Planner. The report displays all selected projects, sorted by Project Title. For each project, the project documents are displayed, sorted by Document Title. For each document, the following information is displayed: Document title, Document number, and Document Owner. Following the list of documents for each project, the Total Number of Documents is displayed.

APQP Project List by Customers

The APQP Project List by Customers report presents a list of projects in Quality Planner for selected customers. The report displays all selected customers, sorted by Customer Name. For each customer, all the projects are displayed, sorted by Project name. For each project, the following information is displayed: Project Name, Part Number, Creation Date, Project Owner, and Project FAA. Following the list of projects for each customer, the Total Projects with Customer value is displayed. At the end of the report, the Total Number of Customers and the Total Number of Projects are displayed.

APQP Project List by Part Numbers

The APQP Project List by Part Numbers report presents a list of projects in Quality Planner for selected part numbers. The report displays all selected part numbers, sorted by Part Number. For each part number, all the projects are displayed, sorted by Project name. For each project, the following information is displayed: Project Name, Customer, Creation Date, Project Owner, and Project FAA. Following the list of projects for each part number, the Total Projects with Part Number value is displayed. At the end of the report, the Total Number of Part Numbers and the Total Number of Projects are displayed.

Training Manager

Audit History for Document

The Audit History for Document report presents a list of documents in Training Manager sorted by Document Revision in either ascending or descending order. The report displays all selected Titles, sorted by Workstation, Type, and User. For each document, the following information is displayed: Title, Workstation, Type, User, Detail Sort, and Detail Order.

Competence History for Document

The Competence History for Document report presents a list of documents in Training Manager sorted by Document Revision in ascending order. The report displays all selected document number and titles, then for each document, the following information is displayed: Revision, Status, Competence Date, Training Type, Trainer, and Trainee. Following the list of documents for each revision are the number of Training Records, and at the conclusion of the report lies the Total Number of Training Records.

Demonstration of Competence History For Trainee

The Demonstration of Competence History For Trainee report presents a list of documents in Training Manager sorted by Trainee in ascending or descending order. The report displays these documents based on the selected Trainee(s) and then by document. For each document, the following information is displayed: Title, Number, Revision, Status, Completion Date, Training Type, and Trainer. Following the list of documents for each Trainee is the Number of Training Records.

Document Detail with Competence Completed

The Document Detail with Competence Completed report presents a list of documents in Training Manager grouped by trainer and trainee in ascending or descending order. The report displays these documents based on the selected Trainer. For each document, the following information is displayed: Title, Number, Revision, Status, Training Type, Trainee and the dates both the training and competence were completed by each Trainee. Following the List of documents for each revision are the Total Number of Training Records.

Document Detail with Competence Overdue

The Document Detail with Competence Overdue report presents a list of documents in Training Manager grouped by trainer and trainee in ascending or descending order. The report displays these documents based on the selected Trainer. For each document, the following information is displayed: Title, Number, Revision, Status, Training Type, Trainee, the Target Competence Date and the Training Completed Date by each Trainee. Following the List of documents for each revision are the Total Number of Training Records.

Document Detail with Competence Scheduled

The Document Detail with Competence Overdue report presents a list of documents in Training Manager grouped by trainer and trainee in ascending or descending order. The report displays these documents based on the selected Trainer. For each document, the following information is displayed: Title, Number, Revision, Status, Training Type, Trainee, the Target Competence Date and the Training Completed Date by each Trainee. Following the List of documents for each Trainer are the Total Number of Training Records by Trainer.

Document Detail with Refresher Competence Completed

The Document Detail with Refresher Competence Completed report presents a list of documents in Training Manager grouped by trainer and trainee in ascending or descending order. The report displays these documents based on the selected Trainer. For each document, the following information is displayed: Title, Number, Revision, Status, Training Type, Trainee and the dates both the training and competence were completed by each Trainee. Following the List of documents for each revision are the Total Number of Training Records.

Document Detail with Refresher Competence Overdue

The Document Detail with Refresher Competence Overdue report presents a list of documents in Training Manager grouped by trainer and trainee in ascending or descending order. The report displays these documents based on the selected Trainer. For each document, the following information is displayed: Title, Number, Revision, Status, Training Type, Trainee, the Target Competence Date and the Training Completed Date by each Trainee. Following the List of documents for each revision are the Total Number of Training Records.

Document Detail with Refresher Competence Scheduled

The Document Detail with Refresher Competence Overdue report presents a list of documents in Training Manager grouped by trainer and trainee in ascending or descending order. The report displays these documents based on the selected Trainer. For each document, the following information is displayed: Title, Number, Revision, Status, Training Type, Trainee, the Target Competence Date and the Training Completed Date by each Trainee. Following the List of documents for each Trainer are the Total Number of Training Records by Trainer.

Document Detail with Training Complete

The Document Detail with Training Complete report presents a list of documents in Training Manager grouped by trainer and title in ascending or descending order. The report displays these documents based on the selected Trainer. For each document, the following information is displayed: Title, Number, Revision, Status, Target Completion Date, Training Type, and Trainee. Following the List of documents is the Total Number of Training Records.

Document Detail with Training Overdue

The Document Detail with Training Overdue report presents a list of documents in Training Manager grouped by trainer and title in ascending or descending order. The report displays these documents based on the selected Trainer. For each document, the following information is displayed: Title, Number, Revision, Status, Target Completion Date, Training Type, and Trainee. Following the List of documents is the Total Number of Training Records.

Document Detail with Training Scheduled

The Document Detail with Training Scheduled report presents a list of documents in Training Manager grouped by trainer and title in ascending or descending order. The report displays these documents based on the selected Trainer. For each document, the following information is displayed: Title, Number, Revision, Status, Target Completion Date, Training Type, and Trainee. Following the List of documents is the Total Number of Training Records.

Documents Requiring Training

The Documents Requiring Training report presents a list of documents in Training Manager sorted by document title, document number, or document admin in ascending or descending order. The report displays these documents based on the selected Administrator. For each document, the following information is displayed: Title, Number, Training Administrator, Number of Trainings, and Number of Trainees. Following the List of documents for each revision are the Total Number of Documents.

Documents with All Refresher Training Complete

The Documents with All Training Complete report presents a list of documents in Training Manager sorted by document title, document number, or document admin in ascending or descending order. The report displays these documents based on the selected Administrator. For each document, the following information is displayed: Title, Number, Training Administrator, Number of Trainings, and Number of Trainees. Following the List of documents for each revision are the Total Number of Documents.

Documents with All Training Complete

The Documents with All Training Complete report presents a list of documents in Training Manager sorted by document title, document number, or document admin in ascending or descending order. The report displays these documents based on the selected Administrator. For each document, the following information is displayed: Title, Number, Training Administrator, Number of Trainings, and Number of Trainees. Following the List of documents for each revision are the Total Number of Documents.

Documents with Refresher Training Overdue

The Documents with Refresher Training Overdue report presents a list of documents in Training Manager sorted by document title, document number, training administrator in ascending or descending order. For each document, the following information is displayed: Title, Number,

Revision, Status, Training Administrator, Number of Trainers, and Number of Trainees. Following the List of documents for each revision are the Total Number of Documents.

Documents with Refresher Training Scheduled

The Documents with Refresher Training Scheduled report presents a list of documents in Training Manager sorted by Document Title in ascending or descending order. For each document, the following information is displayed: Title, Number, Revision, Status, Training Administrator, Number of Trainings, and Number of Trainees. Following the List of documents for each revision are the Total Number of Documents.

Documents with Training Overdue

The Documents with Training Overdue report presents a list of documents in Training Manager sorted by document title, document number, training administrator in ascending or descending order. For each document, the following information is displayed: Title, Number, Revision, Status, Training Administrator, Number of Trainers, and Number of Trainees. Following the List of documents for each revision are the Total Number of Documents.

Documents with Training Scheduled

The Documents with Training Scheduled report presents a list of documents in Training Manager sorted by document title, document number, training administrator in ascending or descending order. For each document, the following information is displayed: Title, Number, Revision, Status, Training Administrator, Number of Trainers, and Number of Trainees. Following the List of documents for each revision are the Total Number of Documents.

Trainee Documents Requiring Training

The Trainee Documents Requiring Training report presents a list of documents in Training Manager sorted by Document Title in ascending or descending order. The report displays these documents based on the selected Trainee(s). For each document, the following information is displayed: Title, Number, Training Administrator, and Trainer. Following the list of all the trainees with their respective required training is the Total Number of Documents.

Training History For Document

The Training History For Document report presents a list of documents in Training Manager sorted by Document Revision in ascending or descending order. The report displays these documents based on the selected Document Title(s). For each document, the following information is displayed: Revision, Status, Completion Date, Training Type, Trainer, and Trainee. Following the list of each document is the Number of Training Records.

Training History For Trainee

The Training History For Trainee report presents a list of documents in Training Manager sorted by Document Title in ascending or descending order. The report displays these documents based on the selected Trainee(s). For each document, the following information is displayed: Title,

Number, Revision, Status, Completion Date, Training Type, and Trainer. Following each list of trainee's history is the Number of Training Records.

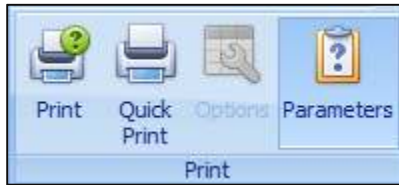
Trainer List

The Trainer List report provides a list of all users identified as Trainers in their user profile.

Result Options

Print Preview Ribbon

Print



Print - Select a printer, number of copies and other print options before printing.

Quick Print - Sends the document directly to the default printer without making changes.

Options - Opens the Print Options dialog, in which you can change printing options.

Parameters - Opens the parameters pane, which allows you to enter values for report parameters.

Navigation



Find - Show the Find dialog to find text in the document.

Thumbnails - Opens the thumbnail view, which allows you to navigate through the document.

Bookmarks - Opens the Document Map, which allows you to navigate through the structural view of the document.

First Page - Navigate to the first page of the document.

Previous Page - Navigate to the previous page of the document.

Next Page - Navigate to the next page of the document.

Last Page - Navigate to the last page of the document.

Zoom



Mouse Pointer – Show the mouse pointer.

Hand Tool – Invokes the hand tool to manually scroll through pages.

Magnifier – Invokes the magnifier. Clicking once on a document zooms it so that a single page becomes entirely visible, while clicking another time zooms it to 100% of the normal size.

Many Pages – Choose the page layout to arrange the document pages in preview.

Zoom Out – Zoom out to see more of a page at a reduced size.

Zoom – Change the zoom level of the document preview.

Zoom In – Zoom in to get a close-up look at the document.

Page Background



Page Color – Choose a color for background of the document pages,

Watermark – Insert ghosted text or an image behind the contents of a page. This is often used to indicate a document is to be treated specially.

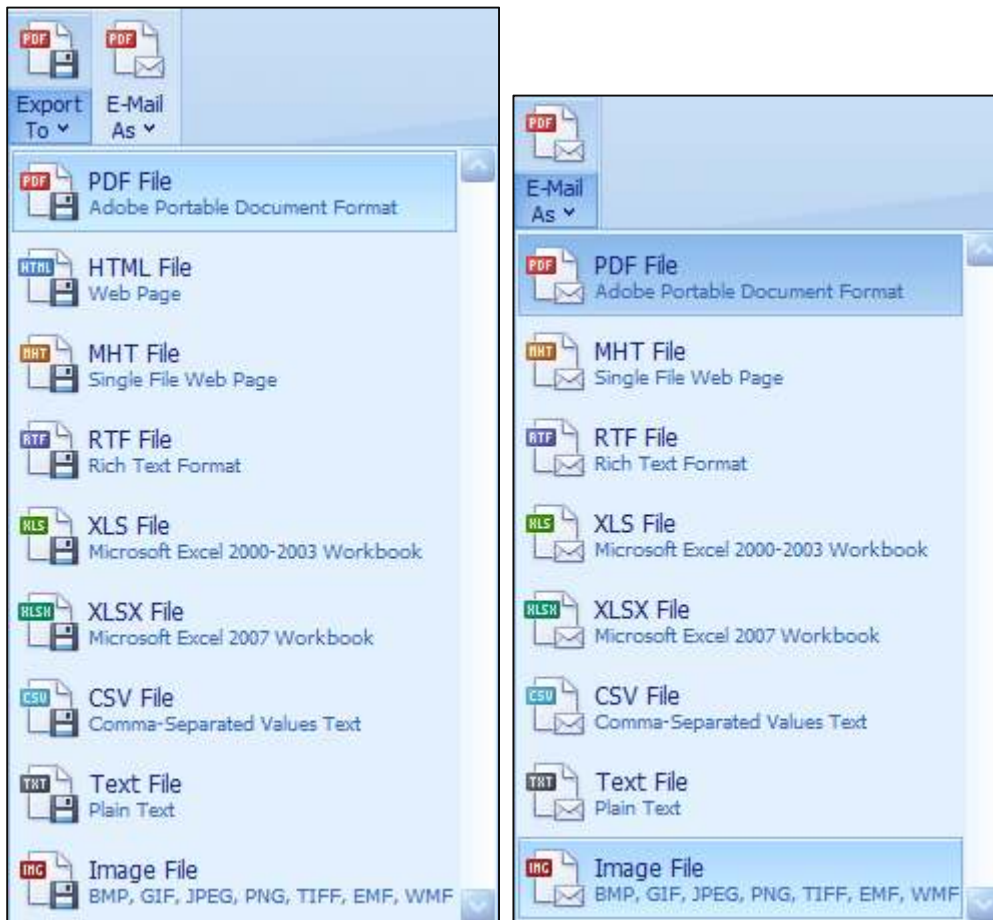
Export



Export To – Export the current document in one of the available formats, and save it to the file on the disk.

E-Mail As - Export the current document in one of the available formats, and attach it to the email.

The following formats are available for export and email:



Each different format has options presented in another dialog after selecting your file type. Afterward, you can name the file and save or email it, depending upon the option you selected.