

This guide covers scheduled report functionality of SafetyNet. It is intended to show users how to create, and manage scheduled reports

Covered Topics:

- Creating Scheduled Reports
- Editing and Deleting Scheduled Reports

Creating Scheduled Reports

Scheduled reports are SafetyNet reports that can be automatically emailed to selected recipients on a scheduled basis (e.g. every Monday morning).

1. Select 'Reports' from the menu bar and click on 'Manage Scheduled Reports'



2. Click the 'Schedule Another Report' button

Scheduled Reports Showing 1 - 7 of 7 Records

Criteria

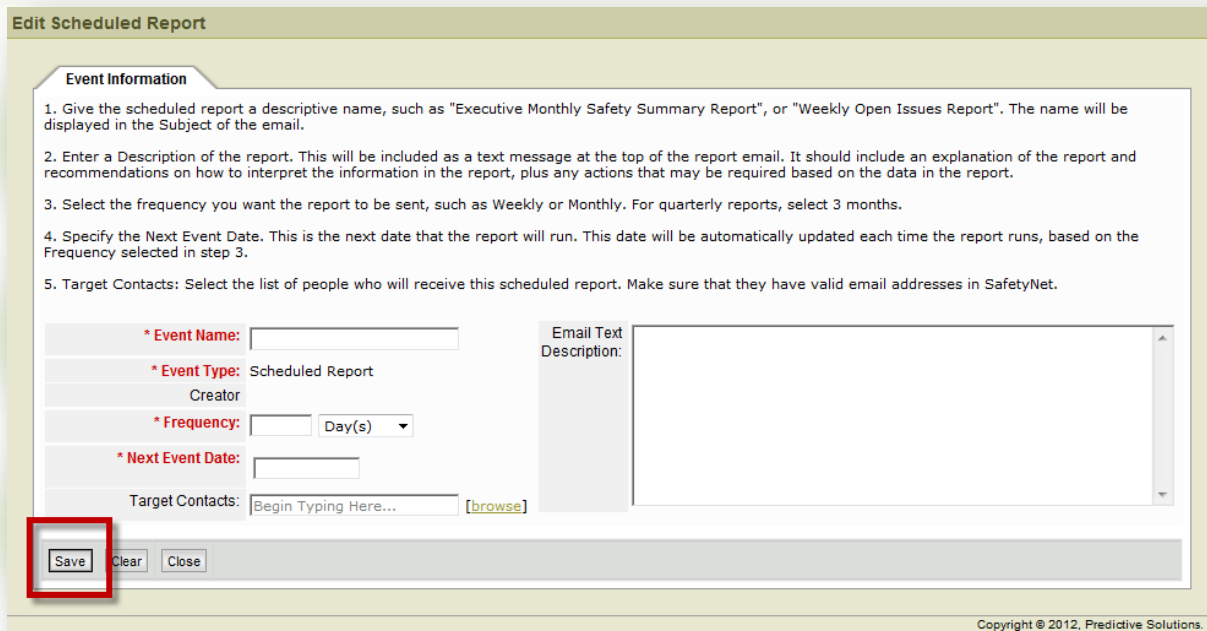
Results

<input type="checkbox"/>	Event Name	Creator	Frequency	Next Event Date	Report Type	
<input type="checkbox"/>	Ben test	Giant Construction Admin	1 Day(s)	02/24/2012	Open Issue Report	Run Now
<input type="checkbox"/>	Detail Report	Giant Admin	1 Day(s)	02/24/2012	Observer Summary Report	Run Now
<input type="checkbox"/>	Executive Meeting	Giant Construction Admin	2 Week(s)	03/01/2012	Detail Report	Run Now
<input type="checkbox"/>	Monthly Plant Summary	Construction Executive	1 Week(s)	02/28/2012	Summary Report	Run Now
<input type="checkbox"/>	My Comparision Report	Giant Admin	7 Day(s)	02/27/2012	Comparison Report	Run Now
<input type="checkbox"/>	Opsource test 2	Giant Admin	1 Month(s)	03/20/2012	Project Summary Report	Run Now
<input type="checkbox"/>	Test OpSource Report	Giant Admin	1 Month(s)	03/20/2012	Project Summary Report	Run Now

Showing 1 - 7 of 7 Records

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3. The Event Information defines who will receive the report and how frequently it will be delivered. Enter the desired information and click the 'Save' button
 - a. Event Name should be a descriptive name (e.g. Weekly Operations Meeting) to make it easy to find and edit the report in the future
 - b. Frequency is how often the report is delivered. You can select a daily, weekly, monthly or yearly frequency. For example, enter 2 and selecting week(s) would deliver the report every other week
 - c. Next Event Date is the next date this report will be run. This combined with the frequency above will determine the schedule for the report. For example, selecting the next Monday will tell the report to run next Monday. Combined with the frequency from the step above we now have a report that will run every other Monday
 - d. Target Contacts are the recipients of this report. These are SafetyNet Contacts, and must have an email address associated with them



Edit Scheduled Report

Event Information

1. Give the scheduled report a descriptive name, such as "Executive Monthly Safety Summary Report", or "Weekly Open Issues Report". The name will be displayed in the Subject of the email.
2. Enter a Description of the report. This will be included as a text message at the top of the report email. It should include an explanation of the report and recommendations on how to interpret the information in the report, plus any actions that may be required based on the data in the report.
3. Select the frequency you want the report to be sent, such as Weekly or Monthly. For quarterly reports, select 3 months.
4. Specify the Next Event Date. This is the next date that the report will run. This date will be automatically updated each time the report runs, based on the Frequency selected in step 3.
5. Target Contacts: Select the list of people who will receive this scheduled report. Make sure that they have valid email addresses in SafetyNet.

* Event Name:

* Event Type: Scheduled Report
Creator

* Frequency: Day(s) ▼

* Next Event Date:

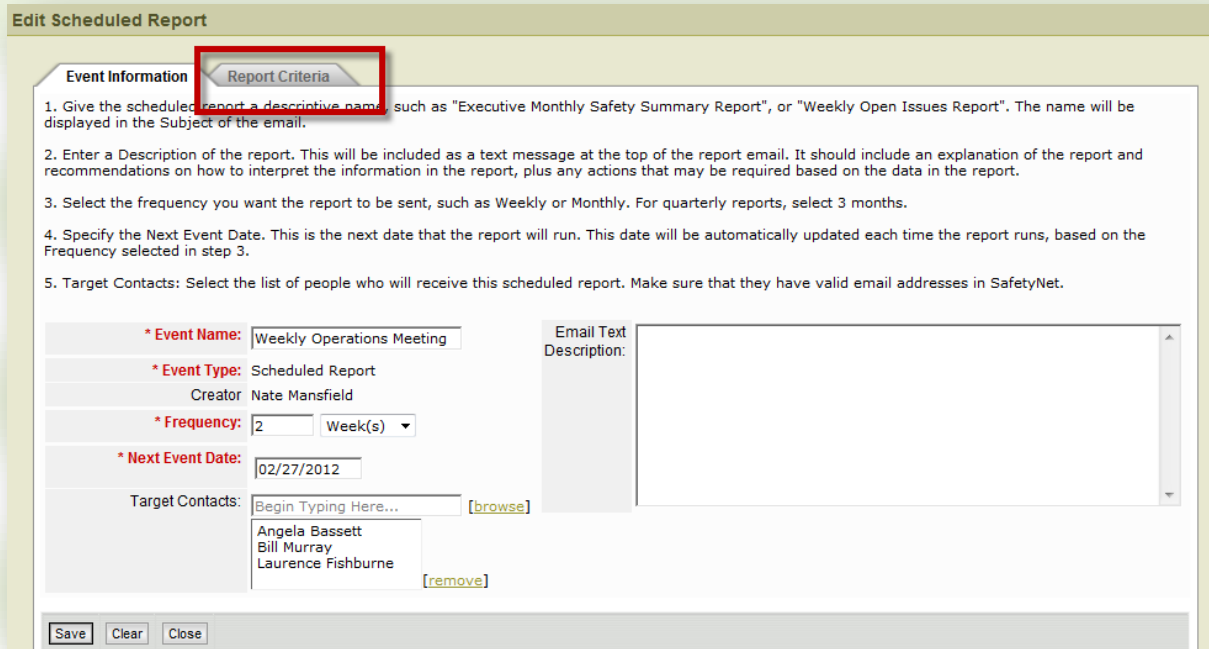
Target Contacts: [browse]

Email Text Description:

Save Clear Close

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- Click the 'Report Criteria' tab



Edit Scheduled Report

Event Information **Report Criteria**

1. Give the scheduled report a descriptive name, such as "Executive Monthly Safety Summary Report", or "Weekly Open Issues Report". The name will be displayed in the Subject of the email.
2. Enter a Description of the report. This will be included as a text message at the top of the report email. It should include an explanation of the report and recommendations on how to interpret the information in the report, plus any actions that may be required based on the data in the report.
3. Select the frequency you want the report to be sent, such as Weekly or Monthly. For quarterly reports, select 3 months.
4. Specify the Next Event Date. This is the next date that the report will run. This date will be automatically updated each time the report runs, based on the Frequency selected in step 3.
5. Target Contacts: Select the list of people who will receive this scheduled report. Make sure that they have valid email addresses in SafetyNet.

* Event Name:

* Event Type: Scheduled Report

Creator: Nate Mansfield

* Frequency:

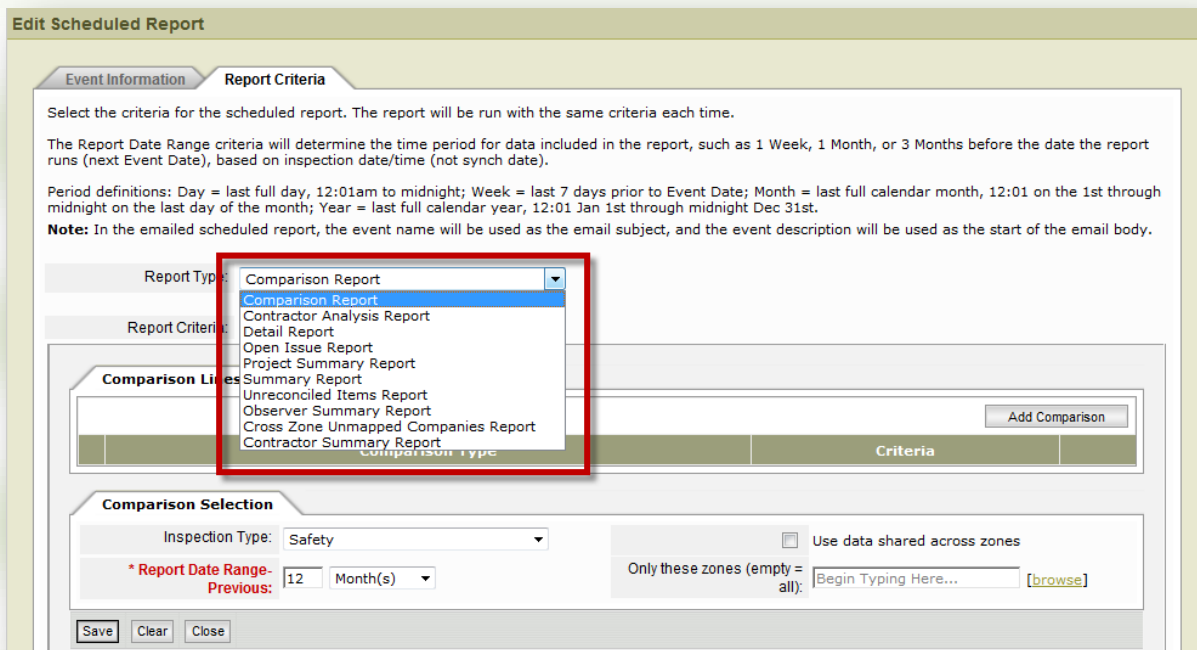
* Next Event Date:

Target Contacts: [\[browse\]](#)

Angela Bassett
Bill Murray
Laurence Fishburne [\[remove\]](#)

Email Text Description:

- Select the 'Report Type' that you want to schedule



Edit Scheduled Report

Event Information **Report Criteria**

Select the criteria for the scheduled report. The report will be run with the same criteria each time.

The Report Date Range criteria will determine the time period for data included in the report, such as 1 Week, 1 Month, or 3 Months before the date the report runs (next Event Date), based on inspection date/time (not synch date).

Period definitions: Day = last full day, 12:01am to midnight; Week = last 7 days prior to Event Date; Month = last full calendar month, 12:01 on the 1st through midnight on the last day of the month; Year = last full calendar year, 12:01 Jan 1st through midnight Dec 31st.

Note: In the emailed scheduled report, the event name will be used as the email subject, and the event description will be used as the start of the email body.

Report Type:

Report Criteria:

- Comparison Report
- Contractor Analysis Report
- Detail Report
- Open Issue Report
- Project Summary Report
- Summary Report
- Unreconciled Items Report
- Observer Summary Report
- Cross Zone Unmapped Companies Report
- Contractor Summary Report

Comparison Selection

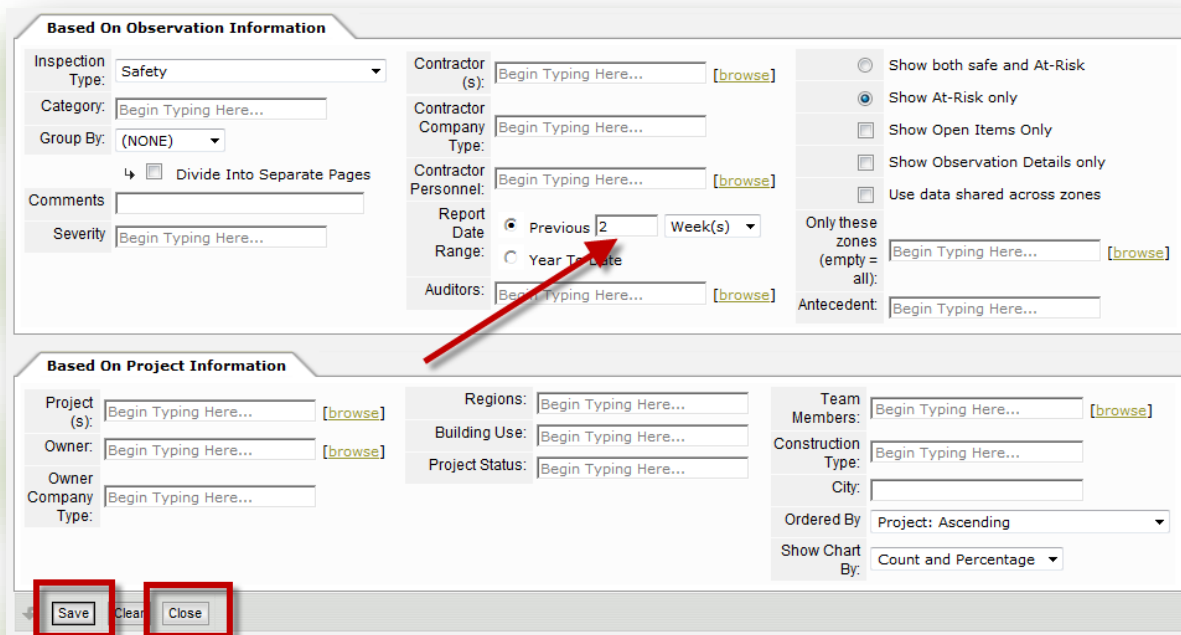
Inspection Type:

* Report Date Range-Previous:

Use data shared across zones

Only these zones (empty = all): [\[browse\]](#)

- Use the criteria sections to setup the data you want contained in the report. It is often useful to use a date range that coincides with the frequency of the report (step 3). For example, since this is a report that will be sent every two weeks, it may be desirable to select a similar date range for this report. Click the 'Save' button to save your selections. When finished, click the 'Close' button



Based On Observation Information

Inspection Type: Safety

Category: Begin Typing Here... [browse]

Group By: (NONE)

Divide Into Separate Pages

Comments: [text area]

Severity: Begin Typing Here...

Contractor (s): Begin Typing Here... [browse]

Contractor Company Type: Begin Typing Here...

Contractor Personnel: Begin Typing Here... [browse]

Report Date Range: Previous 2 Week(s) Year To Date

Auditors: Begin Typing Here... [browse]

Show both safe and At-Risk
 Show At-Risk only
 Show Open Items Only
 Show Observation Details only
 Use data shared across zones

Only these zones (empty = all): Begin Typing Here... [browse]

Antecedent: Begin Typing Here...

Based On Project Information

Project (s): Begin Typing Here... [browse]

Owner: Begin Typing Here... [browse]

Owner Company Type: Begin Typing Here...

Regions: Begin Typing Here...

Building Use: Begin Typing Here...

Project Status: Begin Typing Here...

Team Members: Begin Typing Here... [browse]

Construction Type: Begin Typing Here...

City: [text field]

Ordered By: Project: Ascending

Show Chart By: Count and Percentage

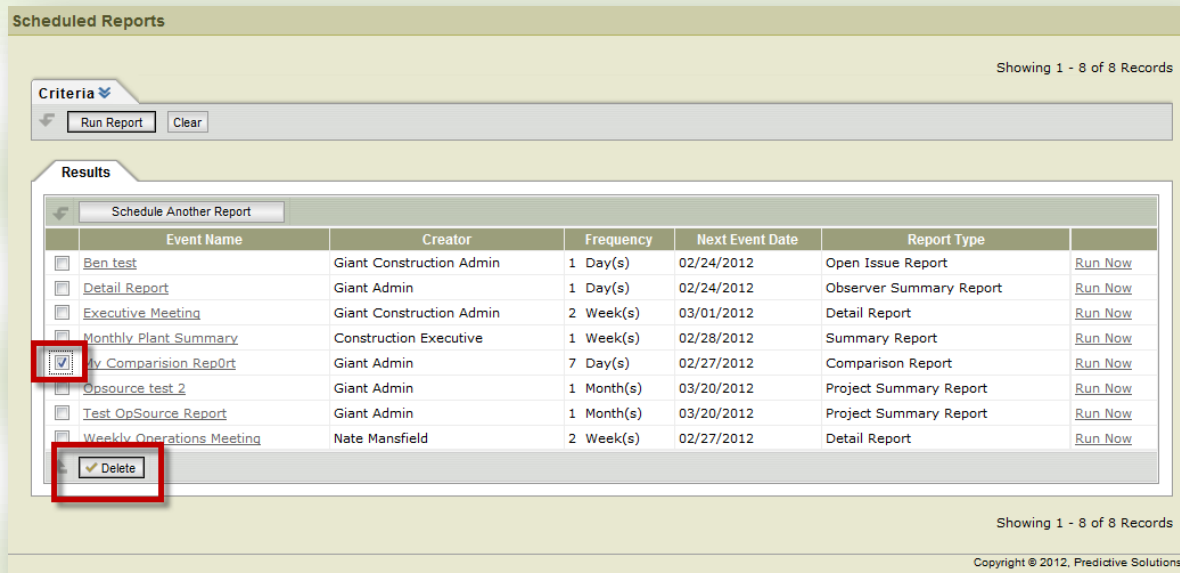
Save Clear Close

Editing and Deleting Scheduled Reports

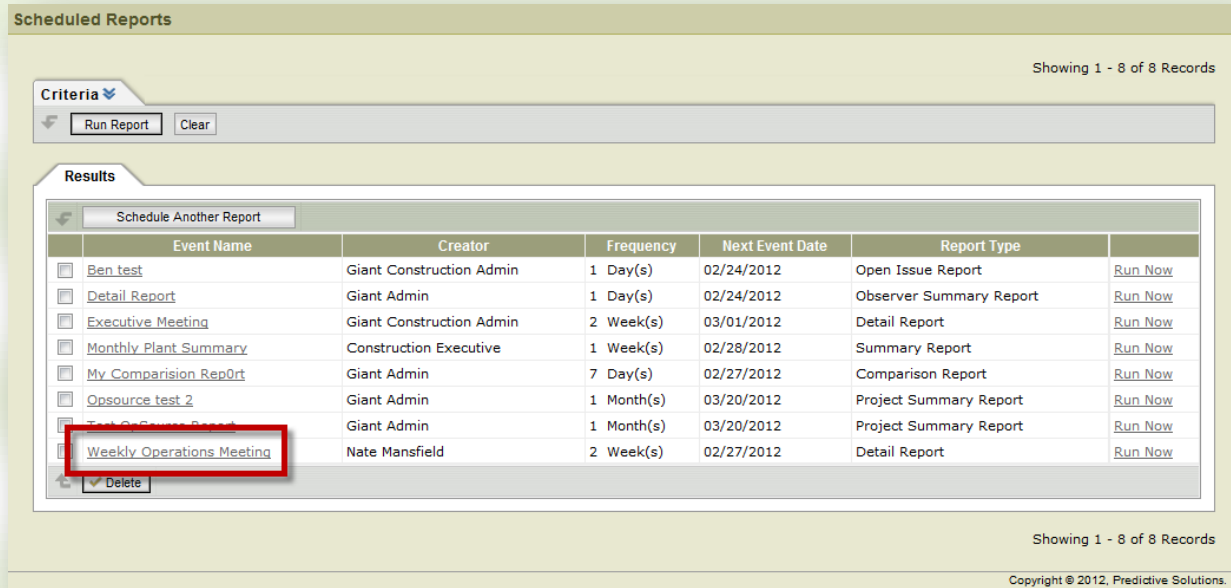
1. Select 'Reports' from the menu bar and click on 'Manage Scheduled Reports'



2. Check the box next to a report and click the 'Delete' button to delete the report



- Click on the report name to edit the report



Scheduled Reports Showing 1 - 8 of 8 Records

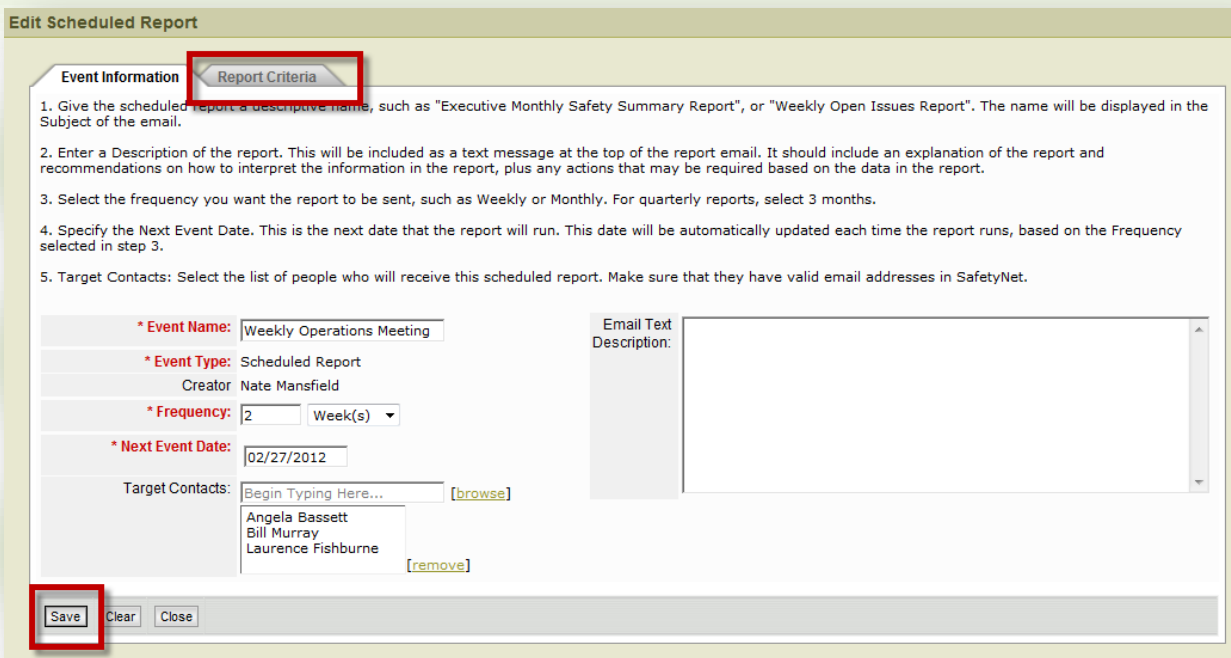
Criteria

Results

Event Name	Creator	Frequency	Next Event Date	Report Type	
Ben test	Giant Construction Admin	1 Day(s)	02/24/2012	Open Issue Report	Run Now
Detail Report	Giant Admin	1 Day(s)	02/24/2012	Observer Summary Report	Run Now
Executive Meeting	Giant Construction Admin	2 Week(s)	03/01/2012	Detail Report	Run Now
Monthly Plant Summary	Construction Executive	1 Week(s)	02/28/2012	Summary Report	Run Now
My Comparision Rep0rt	Giant Admin	7 Day(s)	02/27/2012	Comparison Report	Run Now
Opsource test 2	Giant Admin	1 Month(s)	03/20/2012	Project Summary Report	Run Now
Test Op Source Report	Giant Admin	1 Month(s)	03/20/2012	Project Summary Report	Run Now
Weekly Operations Meeting	Nate Mansfield	2 Week(s)	02/27/2012	Detail Report	Run Now

Showing 1 - 8 of 8 Records
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- On the 'Event Information' tab, you can update the recipients, and schedule of the report. Click the 'Save' button to save any changes. Click on the 'Report Criteria' tab to change the report contents



Edit Scheduled Report

Event Information **Report Criteria**

- Give the scheduled report a descriptive name, such as "Executive Monthly Safety Summary Report", or "Weekly Open Issues Report". The name will be displayed in the Subject of the email.
- Enter a Description of the report. This will be included as a text message at the top of the report email. It should include an explanation of the report and recommendations on how to interpret the information in the report, plus any actions that may be required based on the data in the report.
- Select the frequency you want the report to be sent, such as Weekly or Monthly. For quarterly reports, select 3 months.
- Specify the Next Event Date. This is the next date that the report will run. This date will be automatically updated each time the report runs, based on the Frequency selected in step 3.
- Target Contacts: Select the list of people who will receive this scheduled report. Make sure that they have valid email addresses in SafetyNet.

* Event Name:

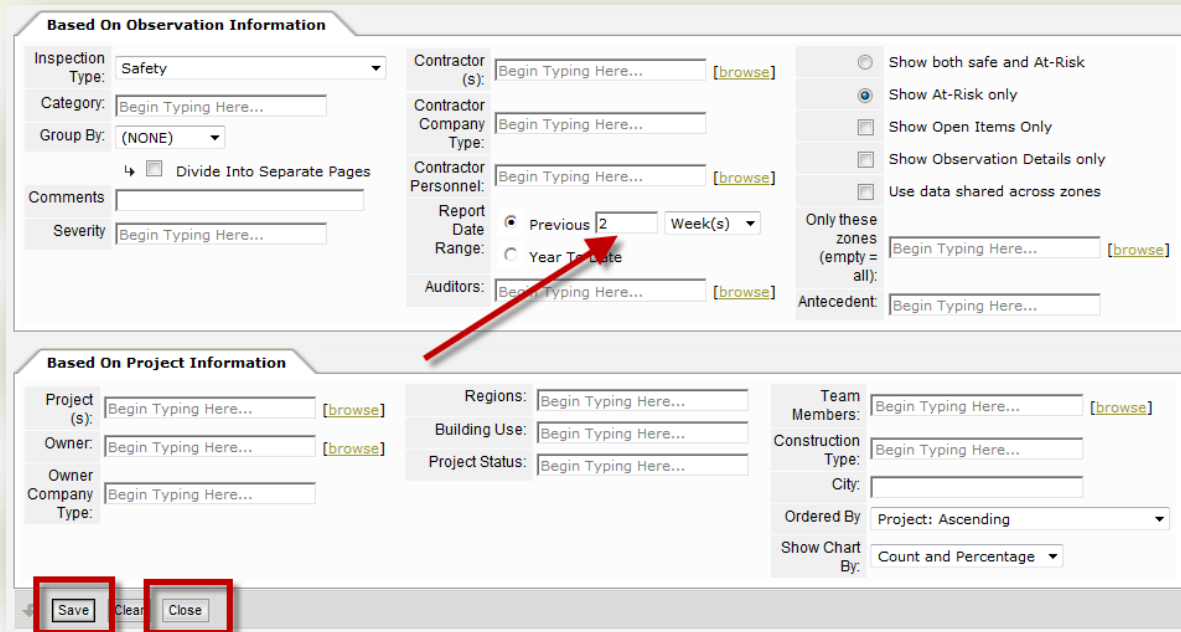
* Event Type: Scheduled Report
Creator: Nate Mansfield

* Frequency:

* Next Event Date:

Target Contacts:
 Angela Bassett
 Bill Murray
 Laurence Fishburne

5. Make any desired changes and click the 'Save' button. Click the close button to return to the log of scheduled reports



Based On Observation Information

Inspection Type: Safety
Category: Begin Typing Here...
Group By: (NONE)
 Divide Into Separate Pages
Comments:
Severity: Begin Typing Here...
Contractor (s): Begin Typing Here... [browse]
Contractor Company Type: Begin Typing Here...
Contractor Personnel: Begin Typing Here... [browse]
Report Date Range: Previous 2 Week(s) Year To Date
Auditors: Begin Typing Here... [browse]
 Show both safe and At-Risk
 Show At-Risk only
 Show Open Items Only
 Show Observation Details only
 Use data shared across zones
Only these zones (empty = all): Begin Typing Here... [browse]
Antecedent: Begin Typing Here...

Based On Project Information

Project (s): Begin Typing Here... [browse]
Owner: Begin Typing Here... [browse]
Owner Company Type: Begin Typing Here...
Regions: Begin Typing Here...
Building Use: Begin Typing Here...
Project Status: Begin Typing Here...
Team Members: Begin Typing Here... [browse]
Construction Type: Begin Typing Here...
City:
Ordered By: Project: Ascending
Show Chart By: Count and Percentage

Save Clear Close