

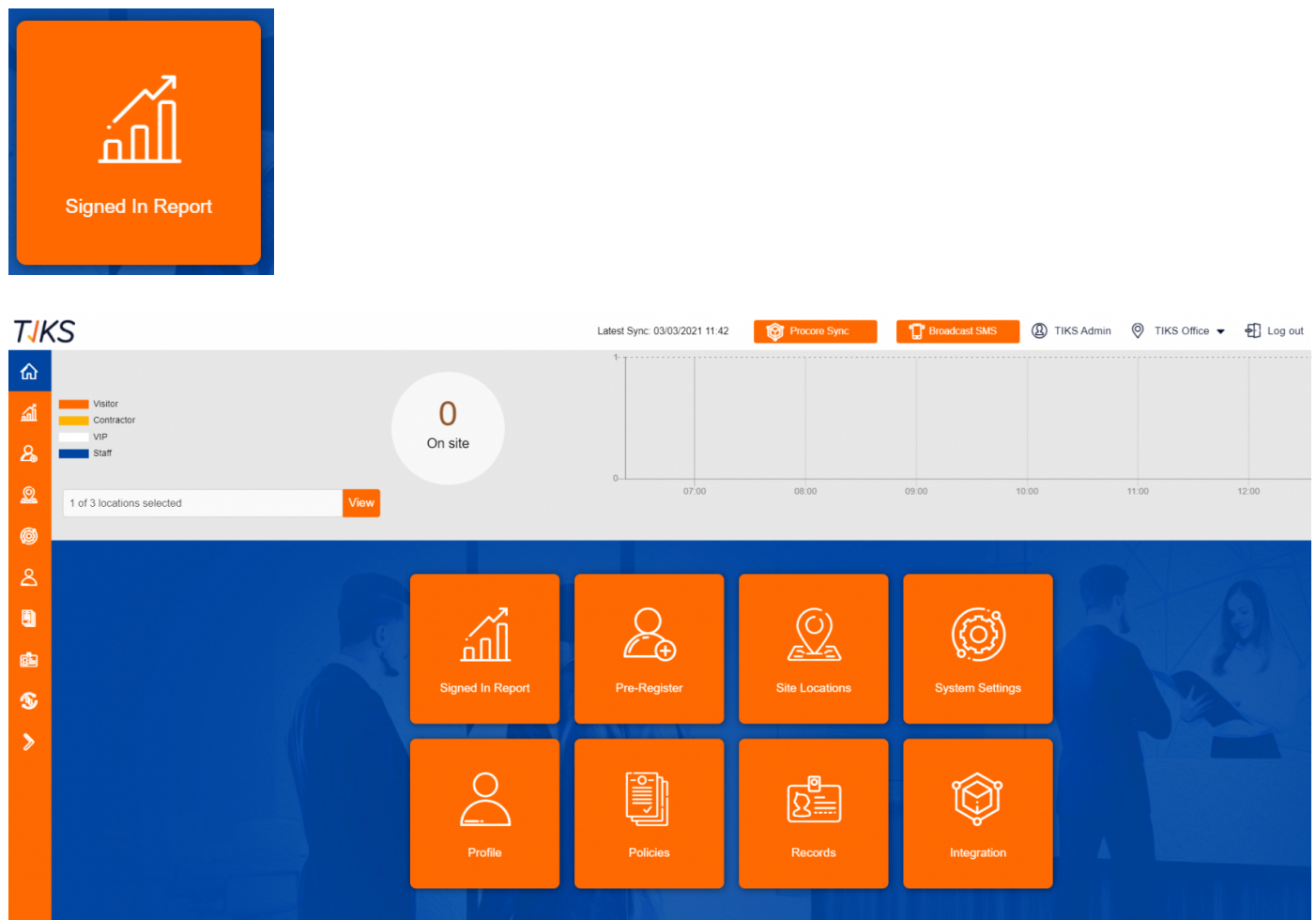
# Reporting

Various system reporting options for filtering data, exporting data etc.

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# How do I download reports of site access history?

From the home screen (dashboard) select "Signed In Report".

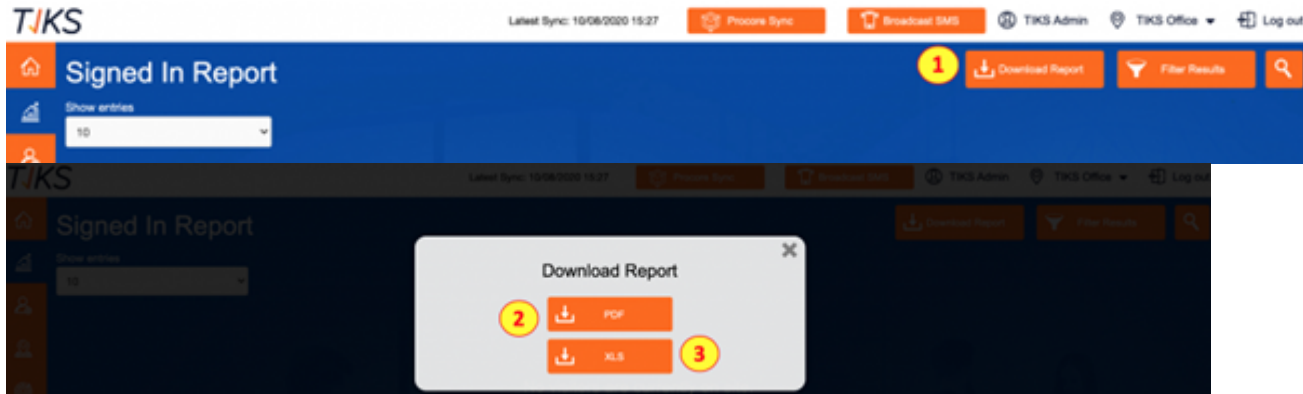


You may need to download data from your Signed In Report for use in other reporting tools. You can download data in both PDF and CSV formats.

1. **Download Report:** In the top right hand corner, you should be able to see a coloured button with the download icon, reading, “**Download Report**”. If you select the “Download Report” button,

you'll see a pop-up with the following two options.

2. **PDF**: If you select the “**PDF**” option, you'll see the window pop-up asking you to save the file, you can name it according to your own naming conventions and select save.
3. **XLS**: If you select the coloured “**XLS**” option, and you will be able to download a CSV file of the Visitor Report.



# How do I filter a report for download?



In the top right-hand corner of the Signed In Report page, after the “**Download Report**” button there is a coloured “**Filter Results**” button, this allows you to manipulate the visitor data to suit requirements.

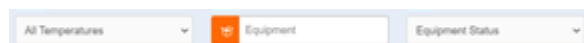
# What filtering options are there for reporting?

The following will outline the filtering option for reporting. You can use one, some or all of these filters to refine your reporting.

A screenshot of the TIKS reporting interface. The interface features a top navigation bar with the TIKS logo, a 'Latest Sync' status indicator showing '2020 15:27', and several action buttons like 'Refresh', 'Broadcast SMS', 'TKS Admin', and 'Log out'. Below the navigation bar, there are eight numbered callouts (1-8) pointing to specific filter fields: 1. 'name' input field; 2. 'company' input field; 3. 'visiting' input field; 4. 'from' date input field; 5. 'to' date input field; 6. 'Visitor Type' dropdown menu; 7. 'On Site' dropdown menu; 8. 'Site Induction Status' dropdown menu. At the bottom right of the filter section, there are 'filter', 'clear', and 'close' buttons.

1. **Name:** name of the visitor, you can use the first or last name, or both.
2. **Company:** name of the company that the visitor belongs to.
3. **Visiting:** name of the person the visitor is visiting.
4. **From date:** sets the 'from' date parameter, if you don't set this it will use the current date.
5. **To date:** sets the 'to' date parameter, if you don't set this it will use the current date.
6. **Visitor type:** you can select 'Visitor', 'Contractor', 'Staff', or 'VIP' from the drop-down, we will go into more detail regarding these user types later in the user guide.
7. **On site:** you can either select 'All of the above', 'On Site', 'Pre Registered' or 'Signed Out' from the dropdown menu. This refers to whether the visitor is still on site or the other visit statuses.
8. **Site Induction status:** you can either select 'valid induction' or 'invalid induction' from the dropdown menu.

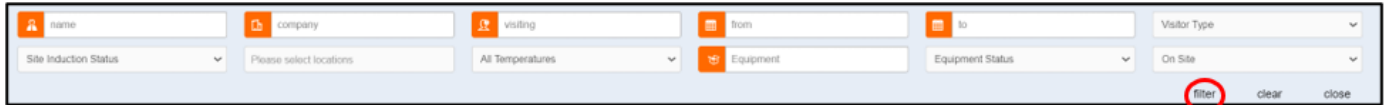
Additional fields may include the following:

A screenshot showing three additional filter fields: 'All Temperatures' (a dropdown menu), 'Equipment' (an input field with a magnifying glass icon), and 'Equipment Status' (a dropdown menu).

- **All Temperatures:** You can select from All, Abnormal and Normal temperatures
- **Equipment:** you can select by equipment type
- **Equipment Status:** you can select by equipment status

Select the options you wish to filter by and then select "**filter**" to apply the filters.

# How do I apply my report filters?



The image shows a horizontal filter bar with a light blue background and a thin black border. It contains several filter categories, each with an orange icon and a text input field: 'name' (person icon), 'company' (building icon), 'visiting' (person with checkmark icon), 'from' (calendar icon), 'to' (calendar icon), 'Visitor Type' (dropdown arrow), 'Site Induction Status' (dropdown arrow), 'Please select locations' (text), 'All Temperatures' (dropdown arrow), 'Equipment' (wrench icon), 'Equipment Status' (dropdown arrow), and 'On Site' (dropdown arrow). At the bottom right, there are three buttons: 'filter' (circled in red), 'clear', and 'close'.

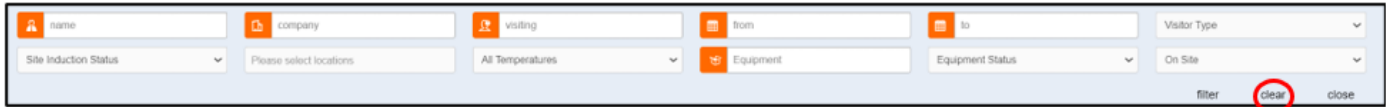
Select your filters then, to apply your filter, select the **'filter'** text in the bottom right-hand corner of the filter bar (circled above).

You can use a combination of any of the filters together at any one time or you can choose not to use a filter, in which case you will just be shown the current visitors on site.

# Why are there no results showing?

If there are no visitors on site or there were no visitors on site at the time to meet your filter requirements, you will see no results and the text will read, "No visitors are currently on site".

# How do I clear my filters?

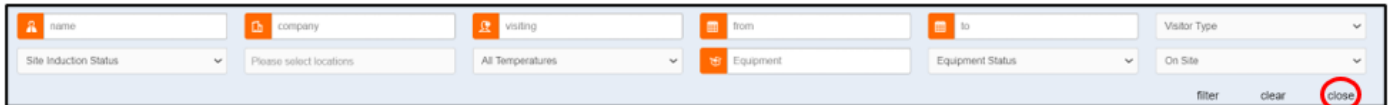


A screenshot of a filter bar interface. The bar contains several input fields and dropdown menus for filtering data. The fields are arranged in two rows. The top row includes: 'name' (with a person icon), 'company' (with a building icon), 'visiting' (with a person icon), 'from' (with a calendar icon), 'to' (with a calendar icon), and 'Visitor Type' (a dropdown menu). The bottom row includes: 'Site Induction Status' (a dropdown menu), 'Please select locations' (a text input), 'All Temperatures' (a dropdown menu), 'Equipment' (with a gear icon), 'Equipment Status' (a dropdown menu), and 'On Site' (a dropdown menu). At the bottom right of the bar, there are three buttons: 'filter', 'clear' (which is circled in red), and 'close'.

To clear your selected filters, select the '**clear**' text in the bottom right-hand corner of the filter bar (circled above).



# How do I close the filter options?

A horizontal filter bar with a light blue background and a thin black border. It contains several input fields and dropdown menus. From left to right: a text input with an orange person icon and the label 'name'; a text input with an orange building icon and the label 'company'; a text input with an orange person icon and the label 'visiting'; a text input with an orange calendar icon and the label 'from'; a text input with an orange calendar icon and the label 'to'; a dropdown menu labeled 'Visitor Type'; a dropdown menu labeled 'Site Induction Status'; a text input with the placeholder 'Please select locations'; a dropdown menu labeled 'All Temperatures'; a text input with an orange calendar icon and the label 'Equipment'; a dropdown menu labeled 'Equipment Status'; and a dropdown menu labeled 'On Site'. At the bottom right of the bar, there are three small, light blue buttons: 'filter', 'clear', and 'close'. The 'close' button is circled in red.

To close the filter bar, select the '**close**' text in the bottom right-hand corner (circled above).