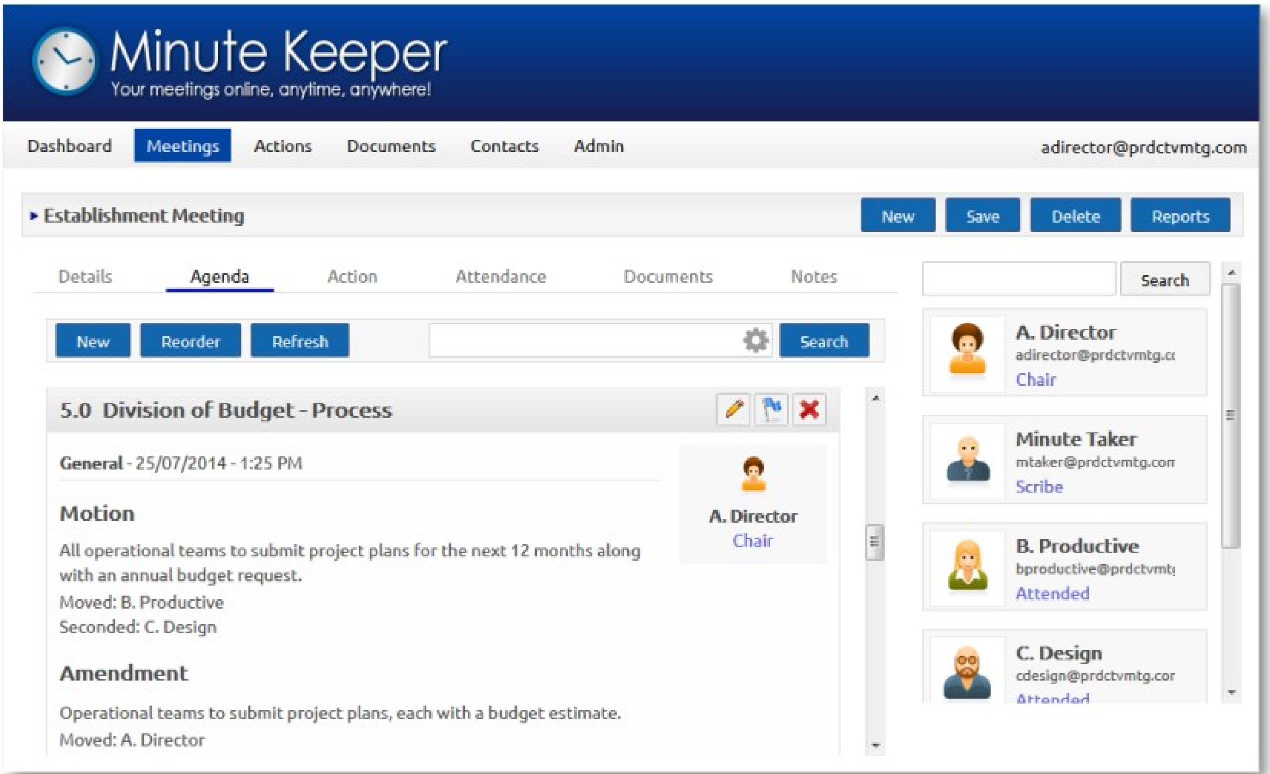
Minute Keeper (Web) Database

User Manual

Version 1.1



OST Database Group

Minute Keeper Database
User Manual

Thanks to:

- Microsoft® Corporation
- Martin Iannuzzi
- All those who have offered comments and corrections

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The sample data is fictional.

If you wish to offer comments and/or suggestions, please email Mark O'Reilly.

Note that screen images presented in this manual may vary from those on your computer depending on your current Internet browser, and the current version of the Minute Keeper database.

Contents

Introducing the Database

Purpose of the Database

The purpose of this database is to allow the recording and printing of meeting agendas and minutes. The agenda items can be entered by either a single or a number of individuals. The agenda would most probably be made available, printed or emailed before the start of the meeting. While the meeting is running the database can be accessed by a nearby computer or laptop, be minuted as each item is discussed, and reviewed while sitting in the meeting. Once the meeting is over, a copy of the minutes can be posted, printed and validated. The minutes can be filtered, sorted or searched at any later time.

Database Structure

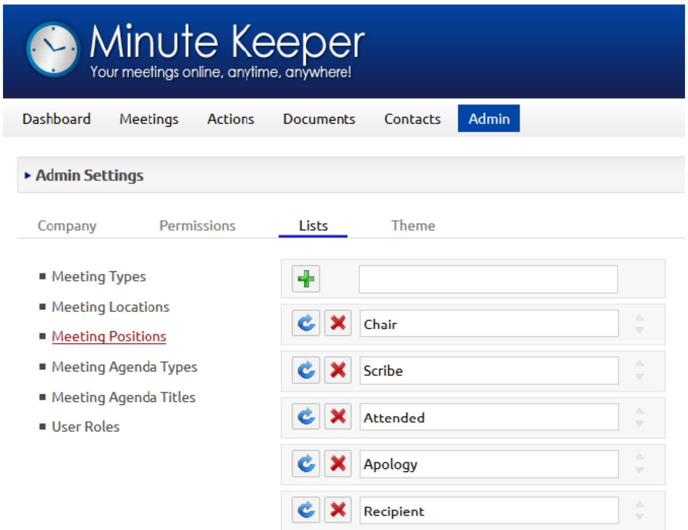
The Minute Keeper database is made up of a set of storage structures known as tables. These tables may store simple lists of data such as meeting types, minute headings or locations. Or they may store extensive data associated with the meetings or the minutes of meetings.

The larger tables or structures within Minute Keeper are used for storing details about meeting participants, meetings, agendas, and minutes. Each meeting for instance, requires the user to identify such items as the Type of Meeting, the Location, the Date, the Chair Person and so on. Against each meeting the user is able to enter multiple agenda items and minutes.

Many items that are recorded on meeting agendas and within the meeting minutes are duplicated from item to item, or from meeting to meeting. For instance the attendees of a particular meeting type might remain relatively constant from meeting to meeting. Some of the items that are brought up at various meetings might be similar, and some office locations might be utilised over and over.

The Minute Keeper database allows you to add many of these items to lists so they may be selected when meetings are being planned and run. For instance, when preparing for a new meeting you are able to select such items as:

- meeting type,
- location,
- meeting positions



You are able to manage the entries within these lists so as to give you greater flexibility and control, and to save considerable typing and preparation time.

It is well understood that different groups have different recording requirements for their meetings. Some require formal meeting procedures and formal minute taking, while others do not. Minute Keeper provides considerable flexibility in its design so as to accommodate such differences. For instance, a formal meeting might require the recording of motions, amendments and substantive motions, while a less formal meeting might only need to record points of discussion and actions. Minute Keeper allows you to select the headings you need for your meetings, while allowing others to select the headings they need.

Much of this flexibility and potential for customisation is illustrated in the Case Study Tutorial provided with the Minute Keeper Database.

The Case Study Tutorial

Often people learn best by '*doing*'. The Case Study Tutorial has been provided for this purpose. The tutorial presents a hypothetical business looking to manage a number of their meetings. The tutorial directs you through:

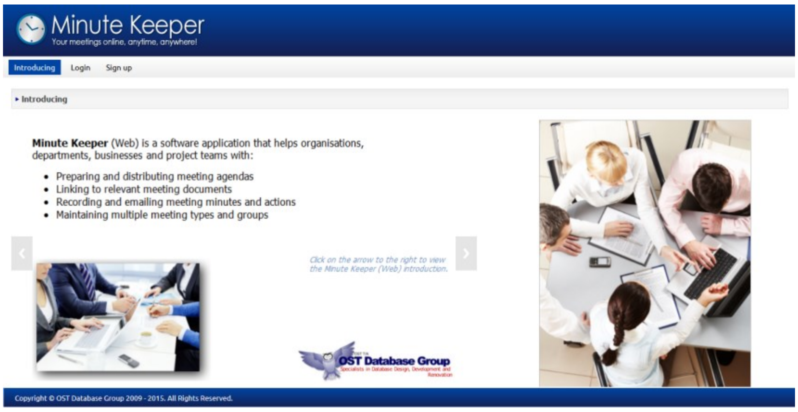
- the initial setup of the Minute Keeper database for the business,
- the entry of meeting details, agendas and minutes, and
- a number of meeting samples that allow you to practise entering meeting agendas and minutes as you might in a workplace, association or club.

At a number of spots within the Case Study Tutorial, you will be directed back to specific sections within this User Manual for reference purposes.

Getting set up with the Database

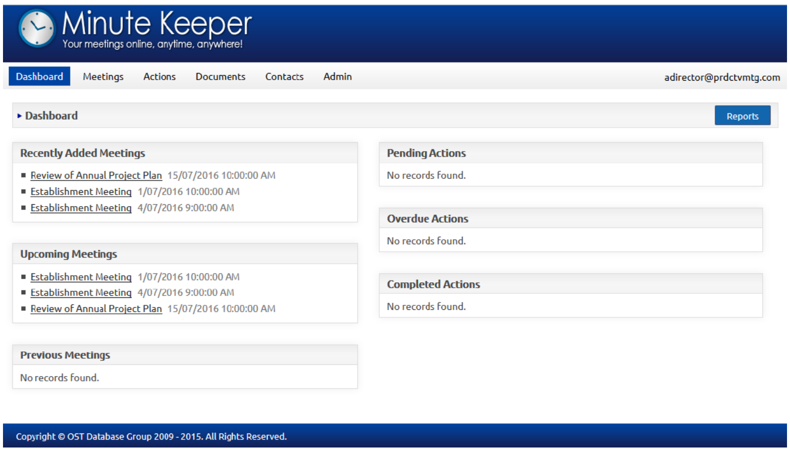
The Main Menu and Introducing Screen

If it is your first use of this database, an Introductory screen may be provided on one of the tabs on the **Login** screen. Use the **arrow** buttons to navigate through the various pages. Read the detail provided.



After logging into the database, the Main Menu is presented. This menu allows you access to the data entry screens and various reports.

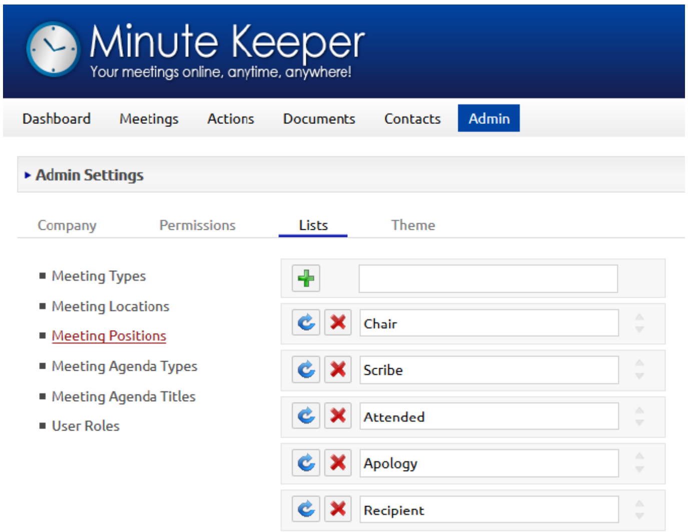
Among the buttons on the Main Menu are:



Dashboard – presenting personalised listings of meetings and actions directly applicable to the person logged in.
Meetings – providing access to the data entry screens for adding and editing meeting detail, agenda items, minutes, actions and for linking in associated documents.
Actions – listing actions from all meetings applicable to the person logged in.
Documents – allowing for the upload of documents applicable to the various agenda items.
Contacts – allowing for the addition of personnel attending or associated with the various meetings.
Admin – for managing the various dropdown list entries, user permissions and application preferences.

Setting up the Underlying Lists

From the Main Menu click on **Admin**. The Admin Settings screen will be displayed. Click on the **Lists** option to view the various underpinning/default lists for your database.



The Admin Settings - Lists page has a number of options down the left hand side. These lists **should be set up as a team** so that there is a consistency of approach and entries are not added in an adhoc manner, ie: without due consultation and agreement.

Meeting Types – add/edit the various types of meetings your organisation holds, eg: budget meeting, project team meeting, social club meeting …
Meeting Locations – add/edit the various locations that most meeting are held. These locations might be very room specific eg: Room2A; or a more general, eg head office, client office …
Meeting Positions – add/edit the various roles that people may be required to take during your various meetings, eg: chair, scribe …
Meeting Agenda Types – add/edit the various agenda item types applicable to your organisation or team, eg: budget item, business plan, marketing plan, apology …
Meeting Agenda Title – add/edit the various titles and highlights to be added within your meeting minutes, eg: motion, amendment, discussion, carried …
User Roles – add/edit the various user roles required by your organisation and/or team(s), eg: Administrator, Standard User, Guest ….

Editing Entries:

With a view to editing data in your lists, click on the required list from the options presented on the left hand side of the screen, then add and/or edit entries within the selected list:

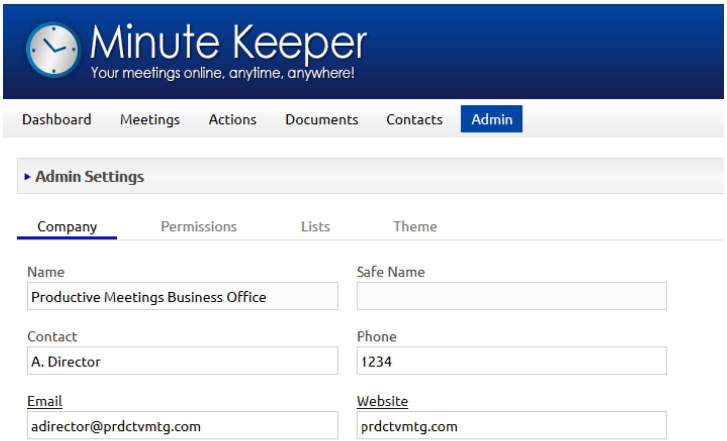
- ***To add a new entry*** – type your entry in the empty field at the top of the list and then click on the **Plus** button.
- ***To edit an entry*** – type your update to an existing entry and then click the **Update** button.
- ***To delete an entry*** – click on the **Delete** button to the left of the applicable entry. **Note:** *delete with due care!*

When adding and editing data on this screen, **the following keyboard keys may be helpful**:

DELETE:	deletes the letter after the cursor, or deletes highlighted text
BACKSPACE:	deletes the letter before the cursor, or deletes highlighted text
HOME:	goes to the start of the textbox or field
END:	goes to the end of the textbox or field
LEFT/RIGHT ARROWS	moves the cursor one letter left or right
TAB	moves the focus from the current field or button to the next field or button
SHIFT & TAB	moves the focus from the current field or button to the previous field or button

Setting up the Company Detail

From the Main Menu click on **Admin,** and then the **Company** option to access the component that will allow you to edit your company details.



Add and/or edit details directly within this page where and as applicable. The Safe Name will not be editable ongoing. Click on the **Save** 

button *(top right of the screen)* when you are satisfied with your edits.

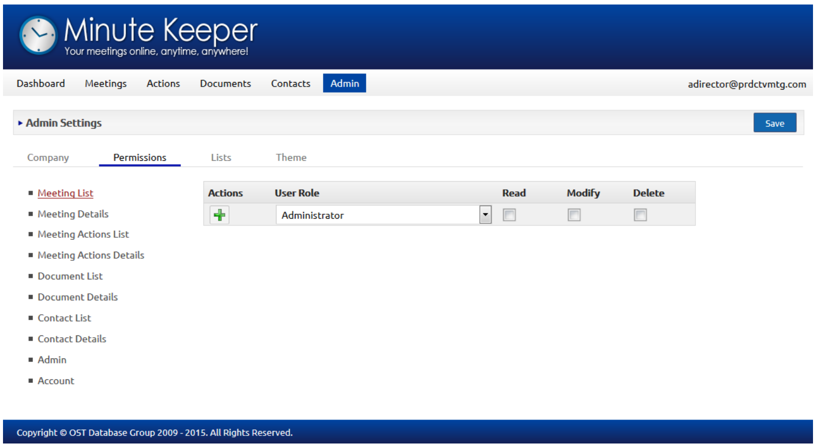
Selecting your Preferred Theme

From the Main Menu click on **Admin,** and then the **Theme** option to access the component that will allow you to select your preferred colour theme.

Just click on your preferred theme.

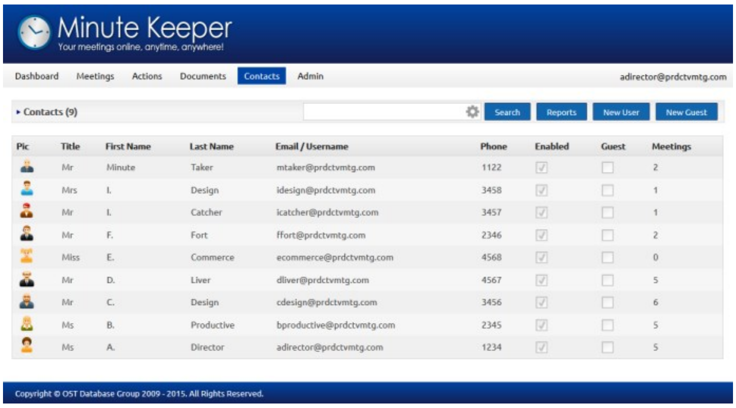
Setting up Permissions

From the Main Menu click on **Admin.** Depending on your access level you may be able to click on the **Permissions** option to access the component that will allow you to establish and maintain permissions. *(Note: this depends on the restriction placed in the Admin section of the website (second bottom from the permissions list))*



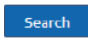
Add, edit and qualify permissions by clicking on each component on the left hand side of the page and adding and editing permissions as applicable.

Adding and Editing Contact Details

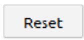


From the Main Menu click on the **Contacts** button. The Contacts List screen will be displayed.

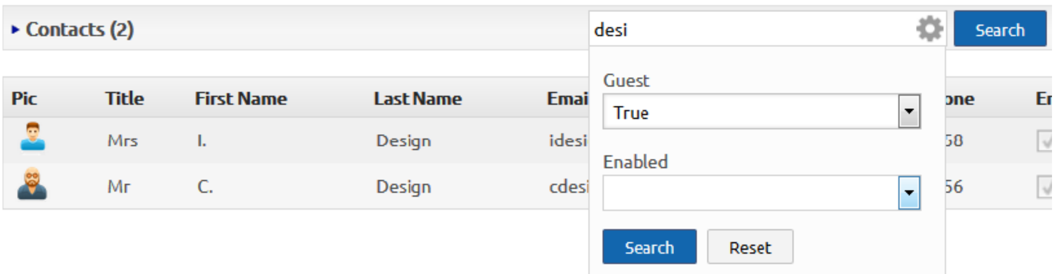
Viewing and Searching Contacts

In the top middle of the Contacts List screen, you are able to enter a **search string** to filter the contact list. For instance, you may wish to display people with the surname *'Design'* in the list. In this case you would type the string - *desi* - into the search string text box and press either the **ENTER** key on the keyboard or the **Search** 

button to the right of the search box. The list will be filtered accordingly, and will display only people where the letters – *desi* - occurs.

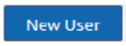
You are also able to click on the **Cog**  button **within the Search box** so that you might also filter by whether you want to view contacts that are Guests and are currently enabled. Drop down the lists attached to these entries and select your applicable preference. Click on the **Reset** 

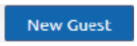
button to reset all the filters.



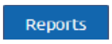
The list of items in the middle of the screen provides access to the Contact Details screen, on which you can add a new contact, edit a contact's details, and/or delete a contact:

- You are able to **click on any part of the rows** in the middle of the screen. A Contact Details screen will be presented within which you can edit the details.

- You can **click on the New User or New Guest** 

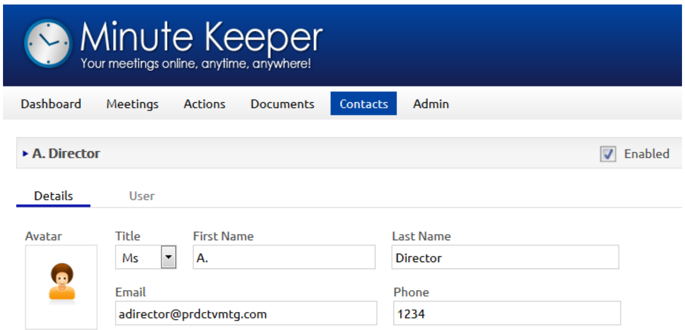


buttons to create a new contact entry.

- You can **click on the Reports** 

button to view and print a report of the entries currently displayed in the list.

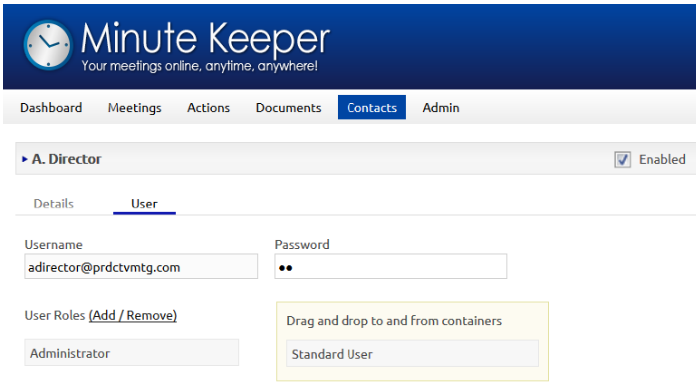
Entering Contact Details



The Contact Details screen allows you to enter the details of meeting participants.

Add the details in the usual way, moving between fields using the TAB key on the keyboard.

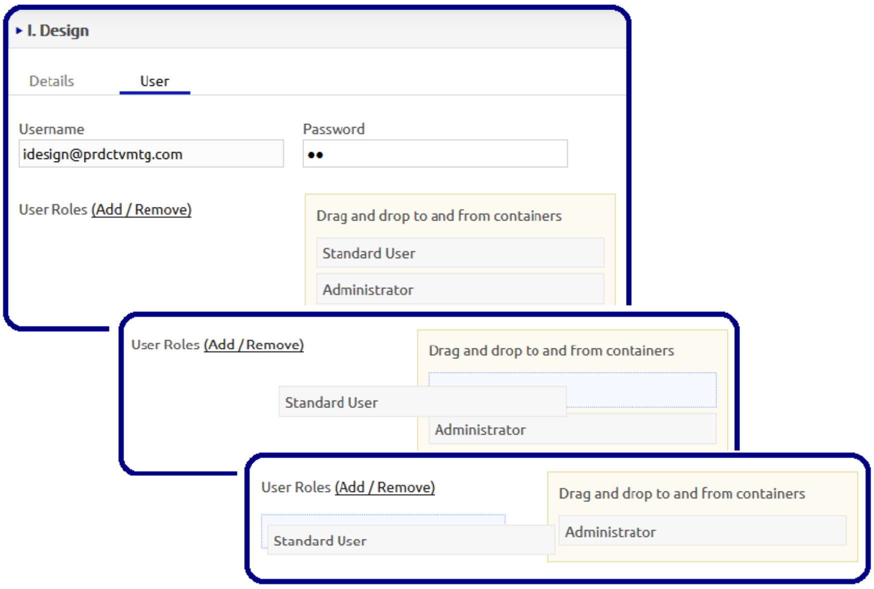
Note the **enabled** option on the top right of the contact detail. This can be used *(for instance)* where you need a contact to remain in the system - as they have meeting items attached to them - but they are not currently active in your team.

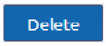


Where permissions allow, click on the **User** tab to add / edit the user's password, or to add or remove *(manage)* the user's roles.

To add a role, click on the **User Roles Add//Remove** link. Using the left hand mouse button, click on and drag one of the roles in the right hand list and drop it into the list on the left.

Do the reverse to remove a role.



To delete an individual contact, you need to click on the **Delete** 

button on the top right of the contact detail page. You will be provided with two options - to make this user inactive or to delete them all together.

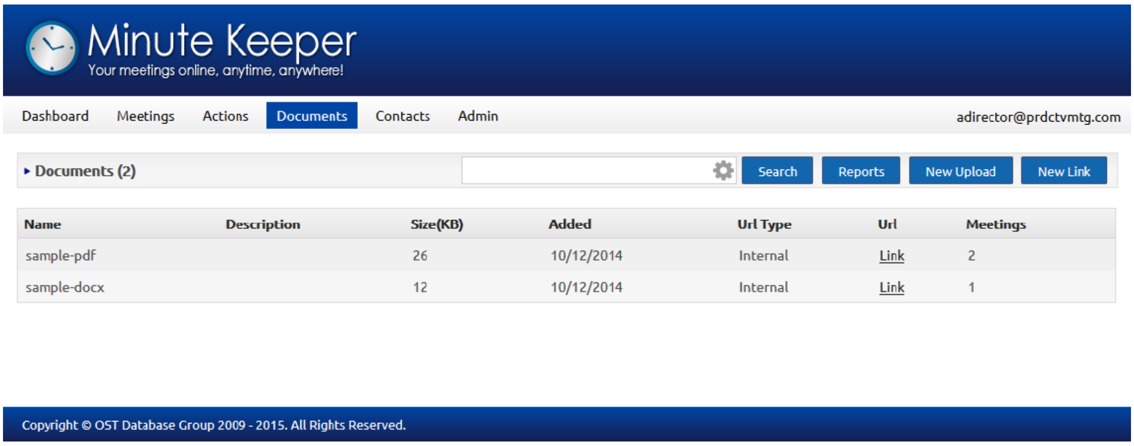
Note: *Be very careful using the latter option -* contacts will be linked to meetings and agenda items, it is important that they are not completely removed from the database without due consideration. That said:

- You may wish to remove their access and/or change their password.
- You may wish to remove their details and/or name and enter place holder information, eg: initials instead of names, a default/non-specific business email address for their live email address, and remove their phone contact details.

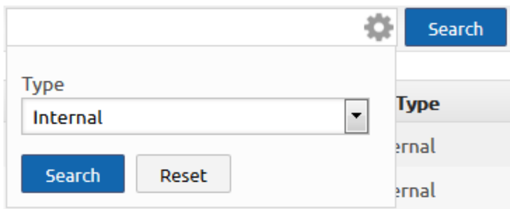
Adding Documents

List of Documents

From the Main Menu click on the **Documents** button. The documents List screen will be displayed.



Use the search facility *(middle top of the document list)* to search for a previously uploaded or linked document. **Enter a search string** to be used to filter the list. For instance, you may wish to display budget related documents. You might type the string - *budg* - into the search string text box and press ENTER on the keyboard or click on the **Search** button to filter the document list. The list will be filtered accordingly, and will display only documents/links where the letters - *budg* - occurs in the name.



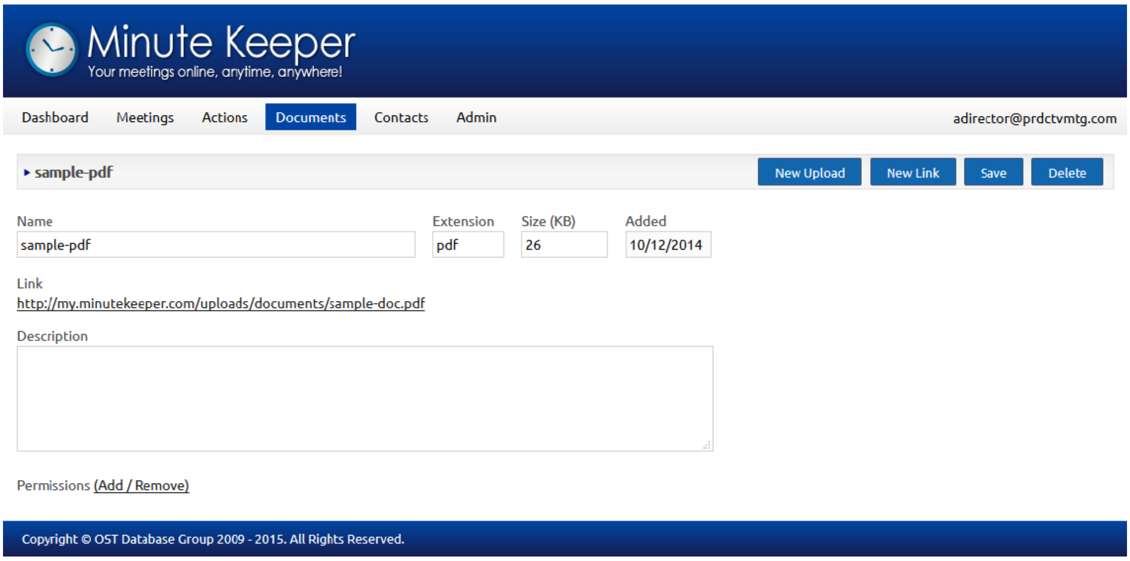
Click on the **Cog** button **within the Search box** should you wish to also filter by document **Type**.

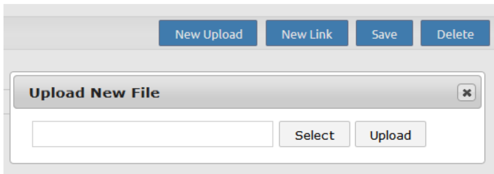
The list of items in the middle of the screen provides access to the Document Details screen, within which you can add a new document, edit an existing document's details, and/or delete a document:

- You are able to **click on a document** in the middle of the screen. A Document Details screen will be presented where you can edit the document's title, description and link.
- You can **click on the New Upload** or **New Link** buttons **to add** new documents or web links.

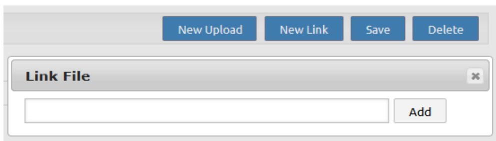
Entering Document Details

The Document Details screen allows you to add the names and descriptions of various documents, to upload the existing copies of these documents, or to add a hyperlink to the document's web-based location.





To upload a document, click on the **New Upload** button. Then within the popup dialog box, click on the Select button. A file dialog box will be presented allowing you to locate and select a required document. On closing the dialog box, click on the Upload button to upload the document. Add a document Title and Description as required. Click on the **Save** button *(top right of the screen)* to save the new document detail.



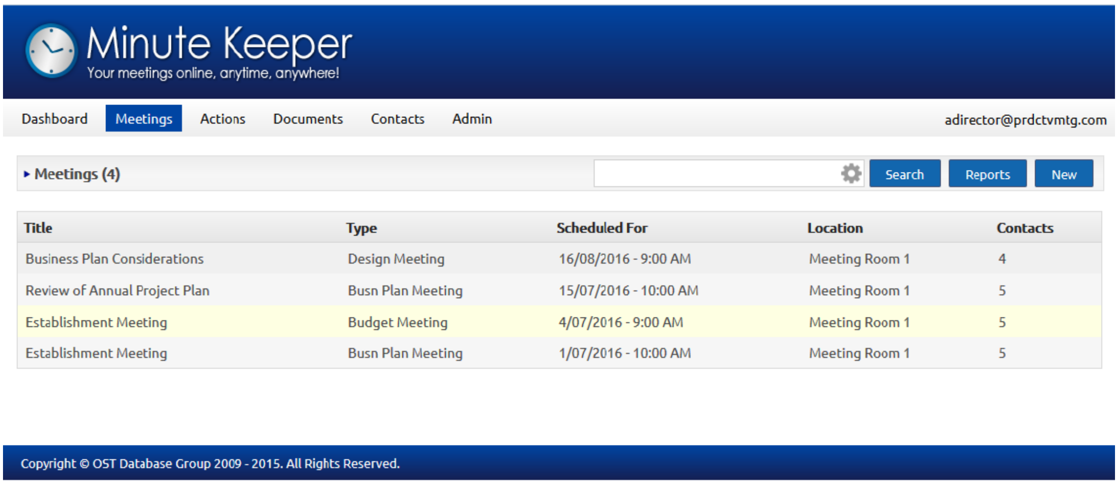
To add a new web link, click on the **New Link** button. Copy and paste in a hyperlink and click the **Add** button. Enter the Document *(Link)* Name and Description as required. Click on the **Save** button *(top right of the screen)* to save the new document detail.

To delete the currently displayed document, click on the **Delete** button and confirm the deletion.

Managing Meeting Detail

Adding a New Meeting

From the Main Menu click on the **Meetings** button. The Meetings list screen will be displayed.



List of Meetings

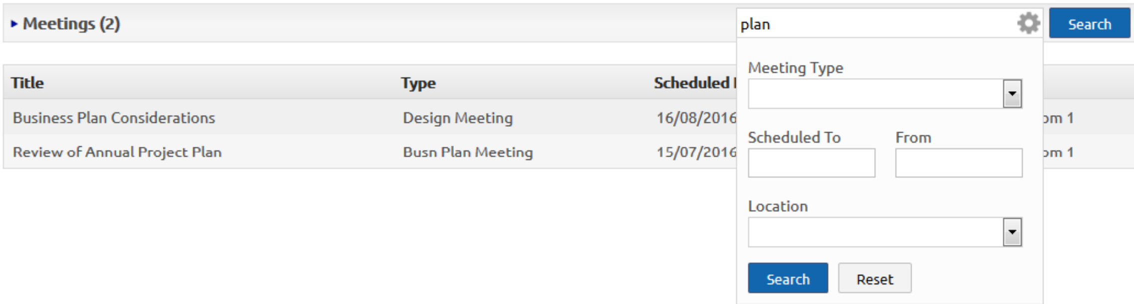
This screen allows you to view and select from the list of current and previous meetings. By clicking on an existing meeting, you will be presented with a screen that will allow you to view and edit the details of that meeting.

You are able to add a new meeting by clicking on the **New** New button at the top right of the screen. A screen will be presented that will allow you to add the details of the new meeting *(discussed on the following pages)*.

Viewing and Searching Meetings

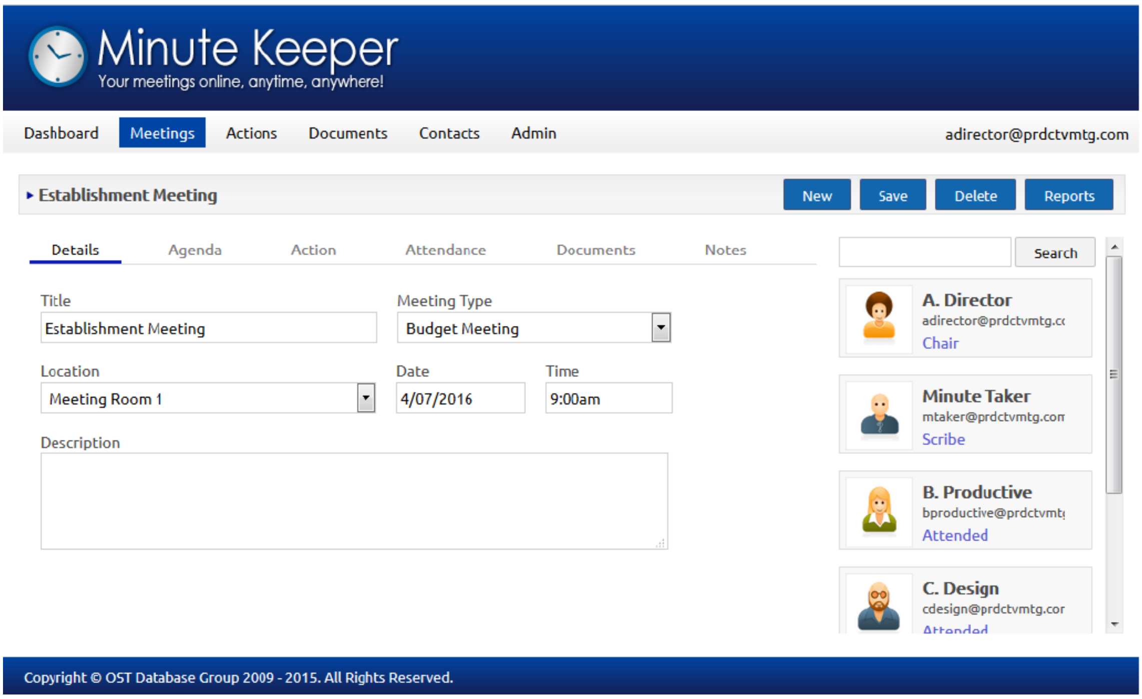
In the top right of the Meetings list screen, you are able to enter a **search string** to filter the meeting list. For instance, you may wish to display all the business planning meetings in the list. In this case you might type the string - *plan* - into the search string text box and press either the **ENTER** key on the keyboard or the **Search** Search button to the right of the search box. The list will be filtered accordingly, and will display only meetings where the letters – *plan* - occurs.

You are also able to click on the **Cog** button **within the Search box** so that you might also filter by Meeting Type, Scheduled To, From or Location. Drop down the lists attached to the Type and Location entries and select your applicable preference. Click on the **Reset** Reset button to reset all the filters.



Editing Meeting Details

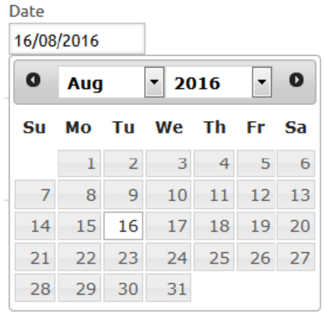
Once you click on a meeting or click on the **New** button on the Meetings list screen, the Meeting Details screen will be displayed. The Meeting Details screen allows you to view, add or edit the primary details of a meeting.

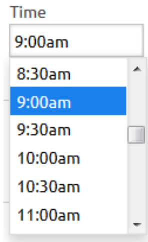


To edit the details of an existing meeting, click on the fields you wish to edit, and edit the details in the usual way. At this point you may wish to review the detail provided in the section: ***Working with Data Entry Screens*** - later in this manual.

Two of the fields on this screen require you to select from a combo box list – Meeting Type and Location. You must have previously entered Meeting Types and Locations in the Admin section of the database in order to select them from their respective lists – review the previous section of the manual: ***Getting set up with the Database***.

To add a new meeting, type in the meeting title, select the meeting type and location, type in or select the meeting date and time and add a meeting description as required.





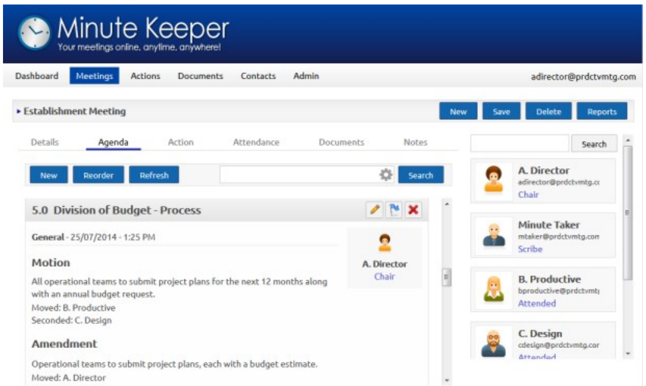
Then click on the Save button on the top right of the meeting detail to save these details to the database.

You are able to delete a meeting by clicking on the **Delete** button on the top right of the screen.

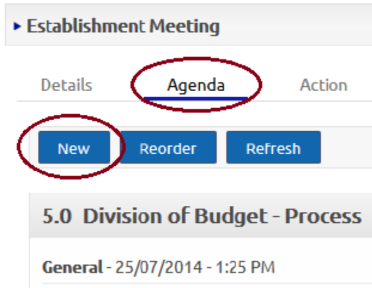
Adding meeting attendees, agenda items, minutes, actions and documents will be outlined in the following discussion.

Creating an Agenda Item

Click on the Agenda option at the top of the Meeting Detail section.

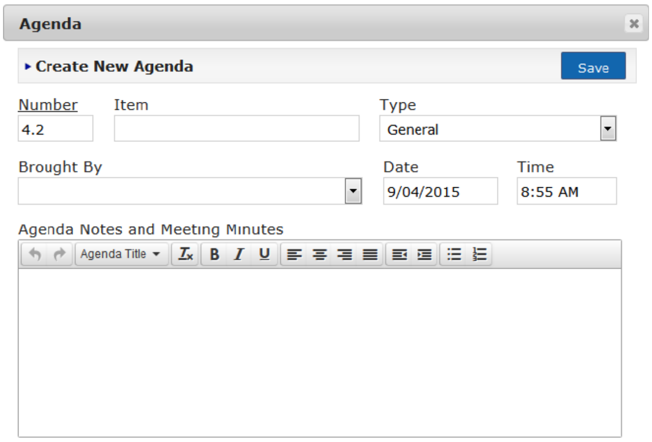


To add an agenda item click on the **New** button on the top right of the Agenda section. A Create New Agenda item popup screen will be displayed.



Enter details for the new agenda item - if/as required, review the detail provided in the section: ***Working with Data Entry Screens*** - later in this manual.

Type in an item number and item title, select an agenda item type and the person bringing the item to the meeting, adjust *(if/as required)* the date and time this item is being added to the meeting. Type in any preliminary Agenda Notes to the field at the bottom of the window: **Agenda Notes and Meeting Minutes**. *(Note that this text area will also be used to record the minutes associated with this agenda item).*



Click on the **Save** button if you wish to save this entry. Click on the **Close** button to close the window.

Note:

- If you click on the Close button without saving, the entry will be abandoned.
- You must have previously entered **Agenda Item Types and Contacts** in the **Admin section** of the database in order to select them from their respective lists – you may wish to review the previous section of the manual: ***Getting set up with the Database***.
- The Item Number field allows you add **levels** within your agenda items, ie: 1, 1.1, 1.1.2, etc.

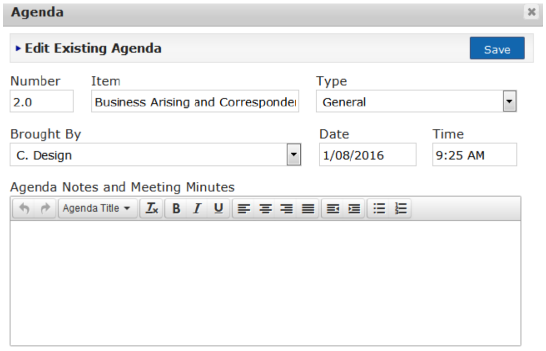
On closing the popup Create New Agenda screen, you will be returned to the Agenda component of the meeting.

Managing Agenda Items

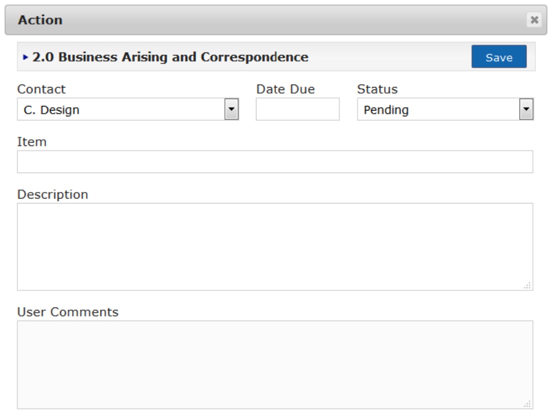
From within the Agenda component, you are able to:

Search for an agenda item in the agenda list. Use the search facility *(middle top of the agenda item list)* to search for a previously entered agenda item. Enter a search string and click on the **Search** Search button to filter the agenda item list. Click on the **Cog** button within the Search box should you wish to also filter by: Agenda Type and/or Brought By.

Edit an agenda item. Locate the agenda item you wish to edit using the search facility *(discussed above)* or by scrolling through the various agenda items *(using the scroll bar to the right of the agenda items)*. Locate and click the **Edit** button on the top right of the agenda item. A popup Edit Existing Agenda screen will be presented allowing you edit the agenda item detail as required.



Add an Action to an agenda item. Locate the required agenda item *(as described above)* and click on the **Add Action** button. An Action popup will be presented allowing you to add/edit the action's due date, status, item title, description and user comments.

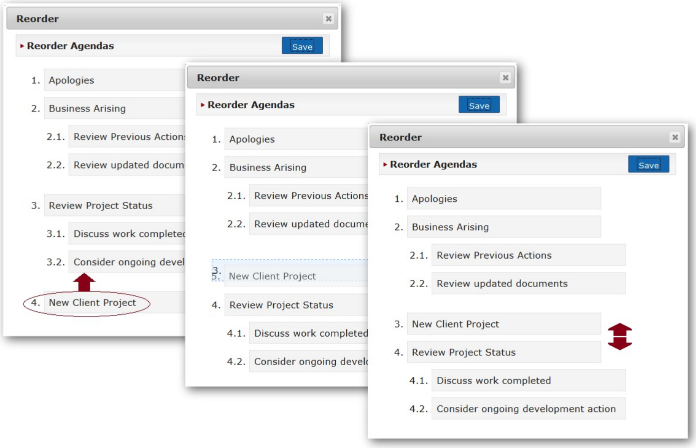


Delete an agenda item. Locate the required agenda item *(as described above)* and click on the **Delete** button. You will be asked to confirm the deletion.

Refresh the agenda list – in the event that more than one user is adding or editing agenda items and the database has not yet caught up. Click on the **Refresh** Refresh button on the top left of the agenda list.

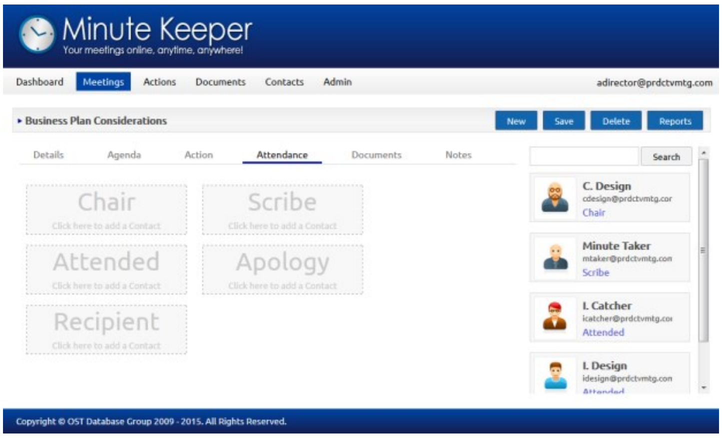
Reorder the agenda items. Click on the **Reorder** 

button on the top left of the agenda list. A Reorder Agendas popup screen will be displayed. Within this screen you are able to click on an agenda item and drag it up or down the list to change its order.



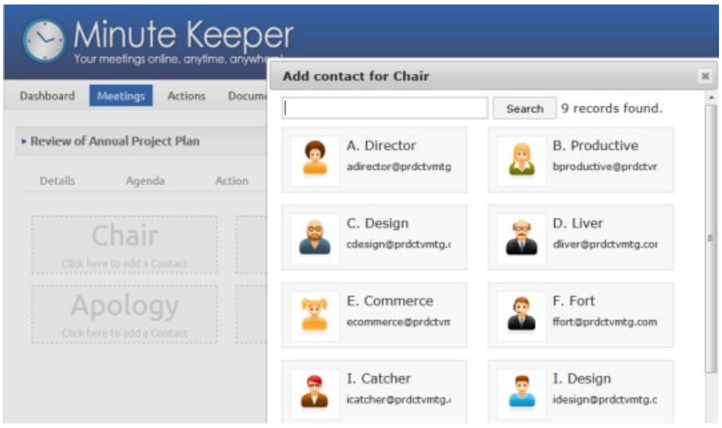
Managing Meeting Attendees

Click on the Attendance Attendance **button within the Meeting screen.** An array of meeting attendance options are presented. Click on the box labelled Chair to select and add the chair of the meeting. Next click on the box labelled Scribe to select and add the scribe of the meeting. Continue this process to add additional attendees, apologies and recipients. *(Recipients are people who may not be required to attend the meeting but **are** to be included in the agenda and minutes distribution list.)*

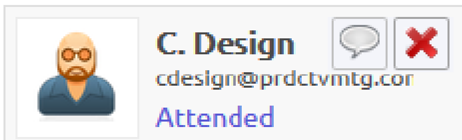


With the popup **Add Contact…**, click on the person or people you require and each will be added to the meeting below. See the attendee list grow on the right hand side of the meeting screen.

Note: you are able to **search** for attendees on the Add Contact… popup screen using the **Search** box and button and/or the scroll bar on the right hand side.



In the event that you may wish to **change an attendee or the role they will be playing**, **roll your mouse** over the applicable attendee and click on the Delete button that appears. Then re-add the attendee if/as required with the correct role.



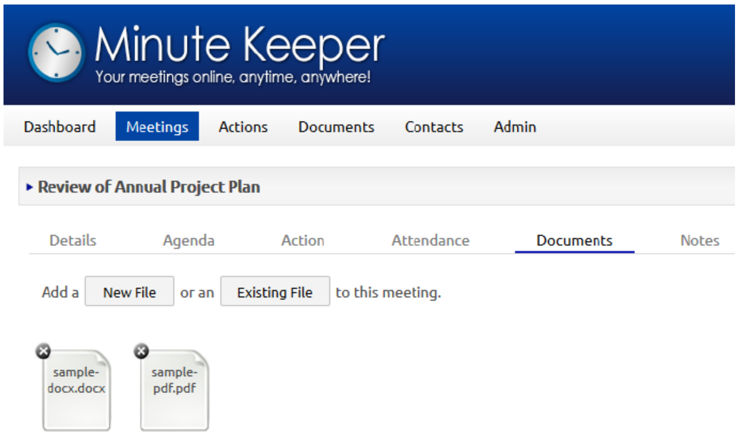
Note that once you have your attendees in place on the Meeting screen, you can roll your mouse over the attendee and click on the **Add Agenda** button to add an agenda item that they are bringing to the meeting.

Linking Documents to a Meeting

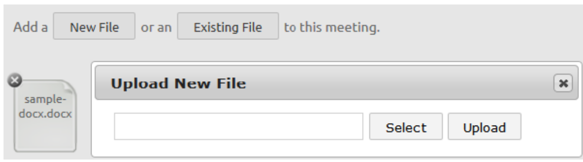
Click on the Documents button within the Meeting screen.

Any documents previously linked to this meeting will be displayed. Click on each document images to view the file content.

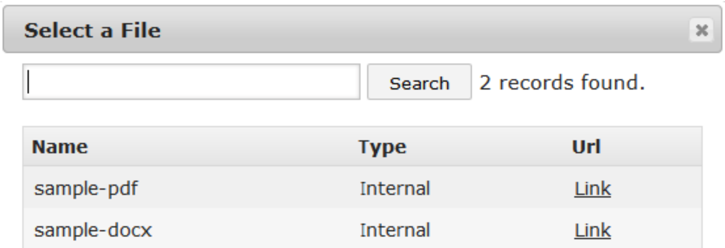
Click on the **Cross** on the top left of a document image should you wish to remove its link to the current meeting.



To add a new document file to the system, click on the New File button. An **Upload New File** popup box will be presented. Click the **Select** button to browse out and locate the document you want uploaded. Click on the **Upload** button to upload the document and link it to the current meeting.



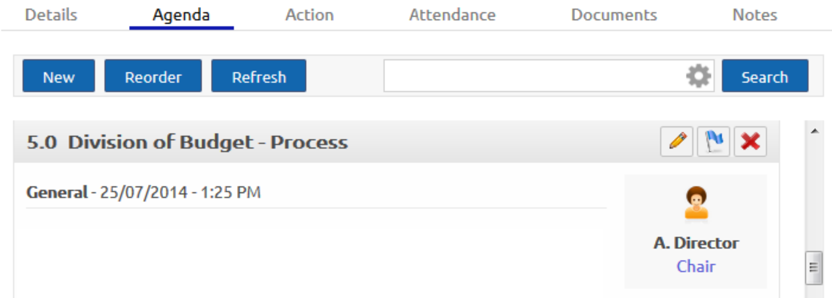
To link in a previously uploaded document, click on the **Existing File** button. Search for and select the required document from the popup screen presented.



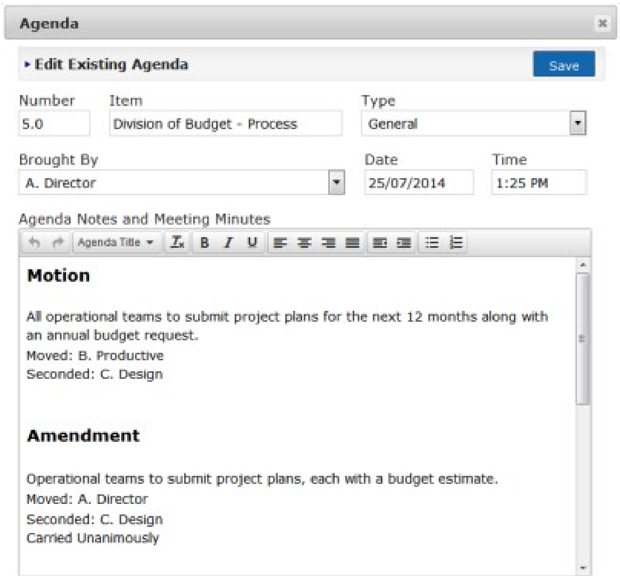
Reference the linked documents further in your meeting agenda items, meeting minutes and/or actions *(as required)* – so as to direct meeting participants to the document links, and to highlight their relevance.

Managing Meeting Minutes

While a meeting is in progress or shortly thereafter the meeting scribe is able to **add the meeting minutes** to each agenda item within the **Agenda** section of the meeting screen.

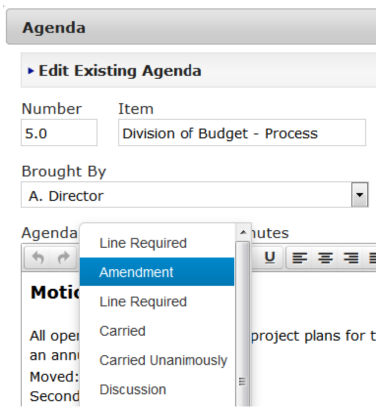


Click on the **Edit** button against each agenda item in turn and add the minutes within the field labelled: Agenda Notes and Meeting Minutes at the bottom of the Edit Existing Agenda popup screen.



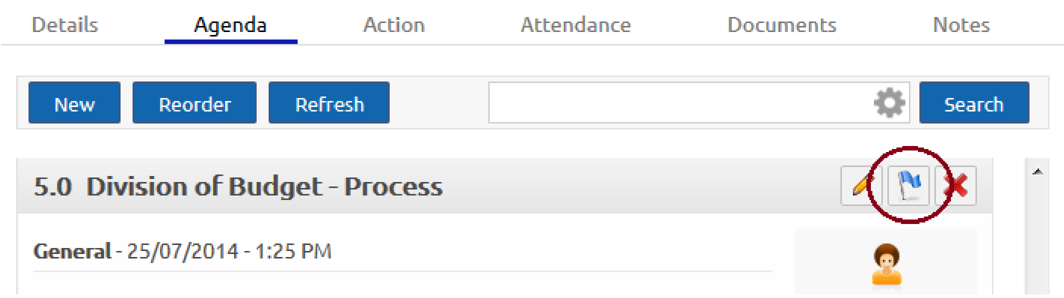
You are able to add relevant headings within the Minutes field. Select the required heading from the **Agenda Title** Agenda Title combo box at the top of the Agenda Notes and Meeting Minutes field. The selected heading will be added.

Reminder: these headings can be added to the dropdown list via the Admin section of the database - review the previous section of the manual: *Getting set up with the Database*.

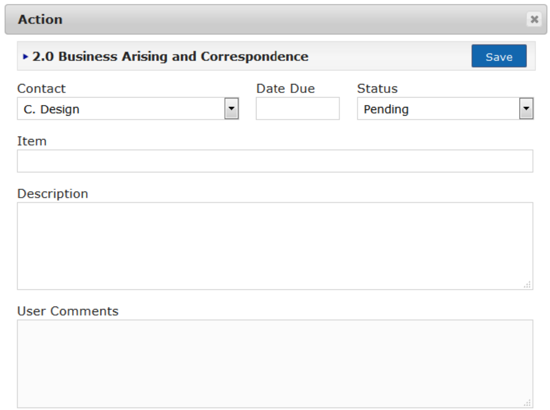


Adding and Managing Meeting Actions

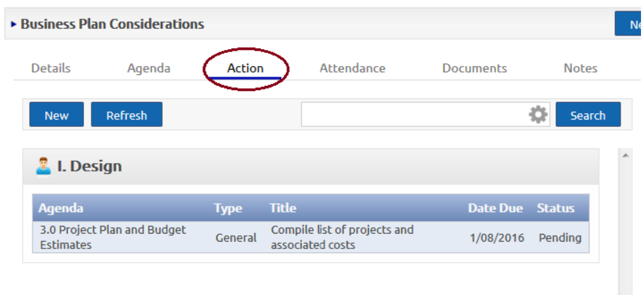
Some meeting types require the recording of **actions** against the various agenda items – looking to ensure meeting follow-up is tracked and managed. Actions can be added against each agenda item via the **Add Action** button.



An Action popup will be presented allowing you to add/edit the action's due date, status, item title, description and user comments.



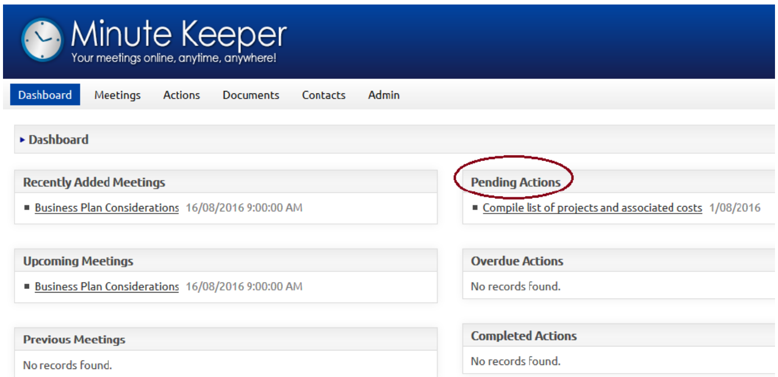
To access a full listing of the **actions for a given meeting**, grouped by meeting participant, click on the Action option within the selected meeting.



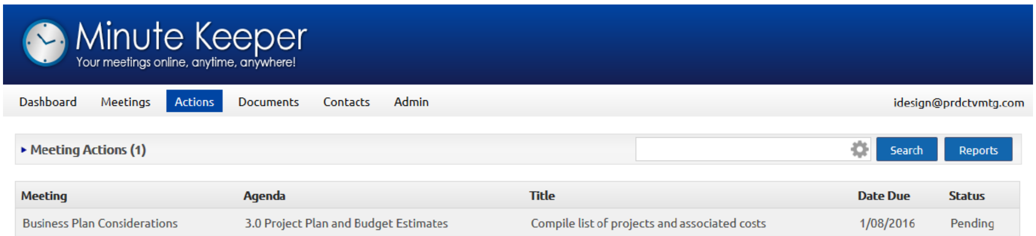
To view actions specific to you *(as the person currently logged into Minute Keeper):*

View items listed on your opening dashboard:

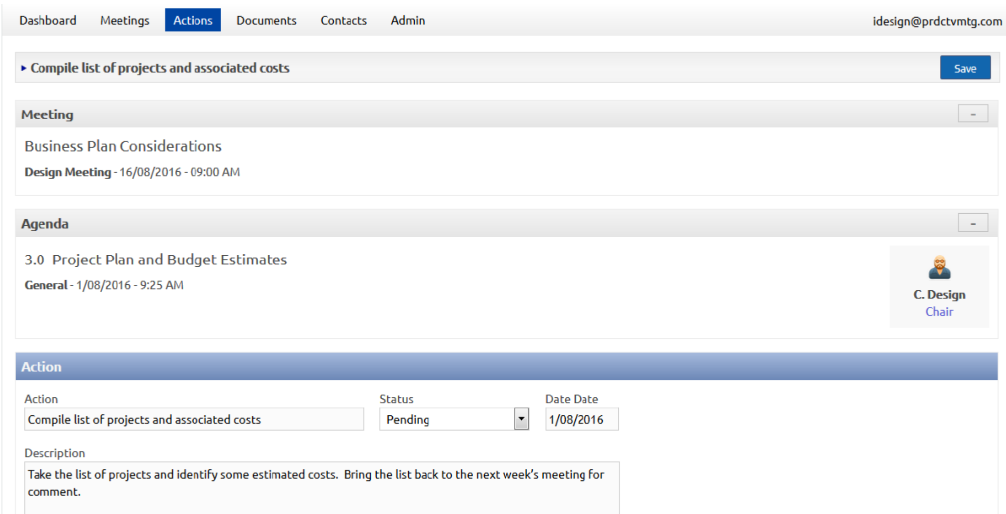
and/or…



Click on the Actions button on the Main Menu:



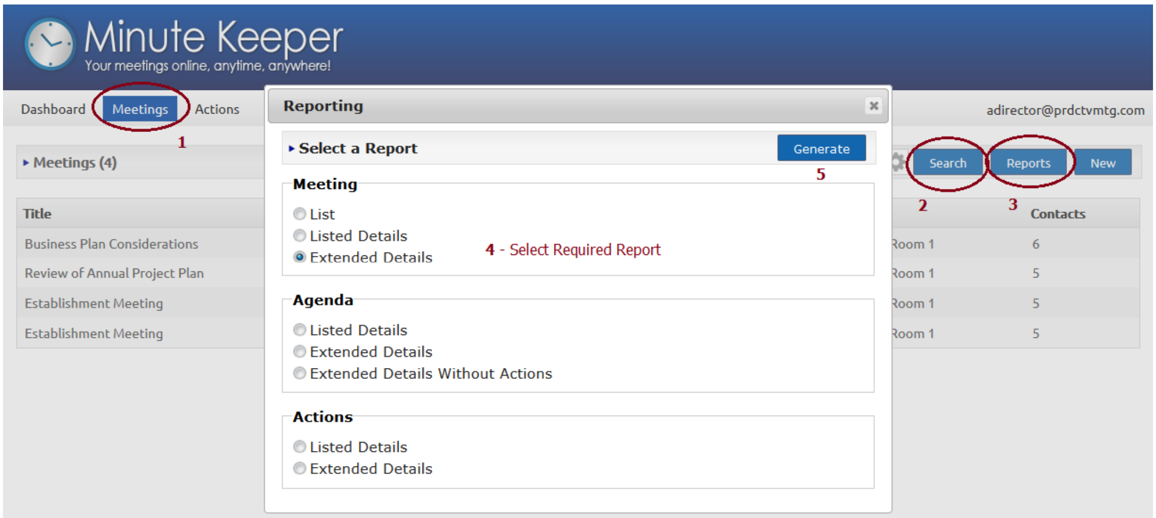
…then click on an applicable action to view and edit relevant detail. Use the **+** and **–** buttons to show and hide the associated meeting and agenda detail:



Producing Meeting Reports

Each section of Minute Keeper has context-sensitive reporting available. For instance, the Meeting List screen has the following report options:

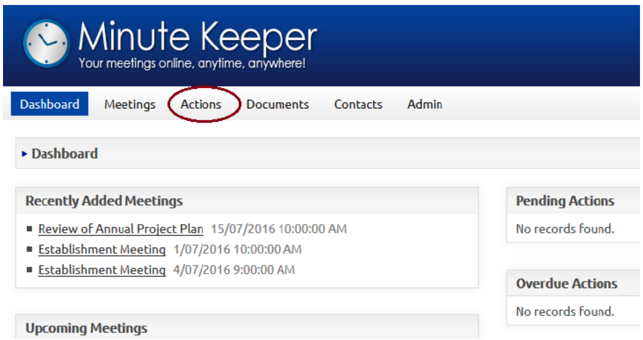
1. Click on **Meetings** on the Main Menu.
2. Filter the meeting lists using the **search** and filter options.
3. Click on the **Reports** button on the top right of the Meeting Lists screen.
4. Select the report from the report menu presented.
5. Click on the **Generate** button to display the applicable report in a new tab.



Open and view the various **reports within each of the Minute Keeper screens** and note the information being presented.

Review the instruction provided toward the end of this manual on: **Printing Reports.** Specifically take note of the report screen menu options.

Managing Meeting Obligations



Upcoming meetings and current actions relevant to yourself *(as the person logged in)* can be viewed on the opening **Dashboard** as well as within the **Action** list available via the Main Menu *(at the top of the screen).*

Working with Data Entry Screens

Navigating the Screens

To move around and operate within the various data entry screens you can use:

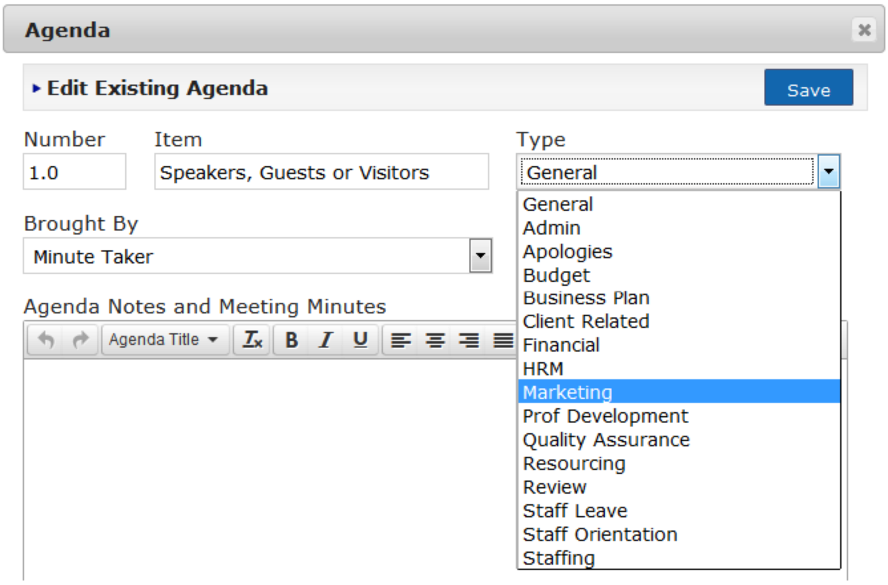
The Left Mouse Button	• to click into text boxes and other screen components, • to click on and move between tabs on the various screens, • to click on buttons, • to click on the arrows and bring down the lists attached to the various combo boxes, • to click on the various scroll bars, • to drag and drop entries such as permissions or to reorder the agenda items.
The Right Mouse Button	• this button is sensitive to the place where the mouse is currently pointing. A popup menu will be presented with a range of standard options applicable to your browser.
TAB key (keyboard)	• to move between the various data entry fields and various buttons on the screen, • press SHIFT and TAB to navigate in the reverse order
ENTER key	• to activate a button once it has been tabbed to, • to execute a search after entering a filter string on a list screen.
ARROW keys	• to move left and right within text fields, • to move left and right, up and down within memo fields, • CTRL & Left/Right Arrows to jump between words.
ESC key	• to escape from some of the message boxes and popup screens.
CTRL key	If you hold down the CTRL key and press: • X, C and V : cuts, copies and pastes field text and whole records, • HOME/END: moves to the beginning or end of the current entry, • Left and Right arrows: hops through a text field a word at a time.
ALT key	If you hold down the ALT key and press: • TAB: allows you to swap from Minute Keeper to another open application within Windows, • F4: closes the browser or whatever application is currently being used, • - : opens the Control Menu Box on the current screen, • SPACEBAR: opens the Control Menu Box on the current window.
DELETE key	Deletes text after the cursor. You can also click on this area and use the CTRL_C / CTRL_V combinations to copy an existing record to a new blank one.

Using Combo Boxes

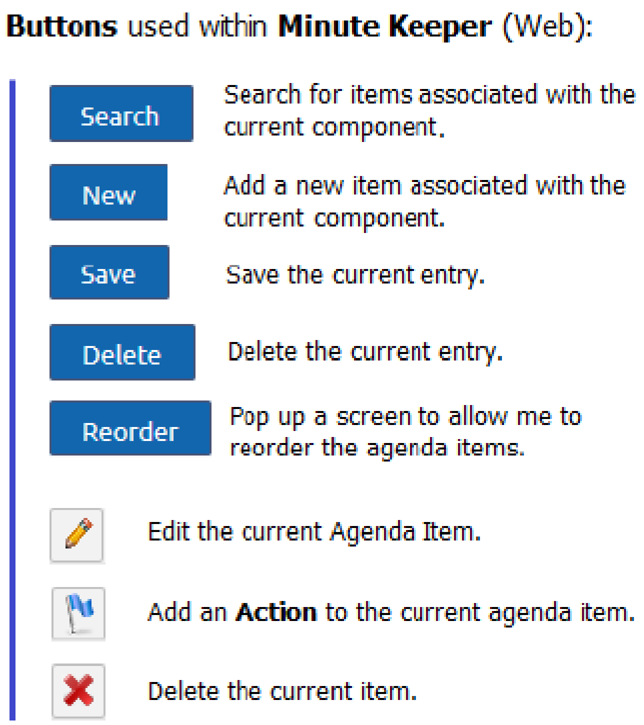
You can click on the down arrow of the Combo Box fields with the mouse (such as Brought By or Meeting Type) in order to select from an attached list. Once a list is displayed, use the left mouse button on the scroll bar on the right side of combo box to shift the list up or down – if/where applicable. You could use the Up/Down Arrow keys on the keyboard to do much the same. If you favour using the keyboard, you can also access a Combo Box by TABing to the field and pressing ALT-DOWN ARROW (ie: hold down the ALT key and press the Down Arrow) to display the list. Then use the UP and DOWN ARROW keys to move through the drop-down list.

Combo box lists are usually sorted in alphanumeric order. In such cases, if you type the first few letters or numbers of the item you require, the closest match will be made by the combo box and be presented to you in the field. It may be that a few letters will be enough for the combo box to display the actual entry you require. After typing a couple of letters, you may wish to show the full list as explained above and you will find that the list will be sensitive to the letters that you have already typed in.

Select an entry in the list by clicking on the entry with the mouse, or highlighting it and then pressing ENTER or TAB key on the keyboard.



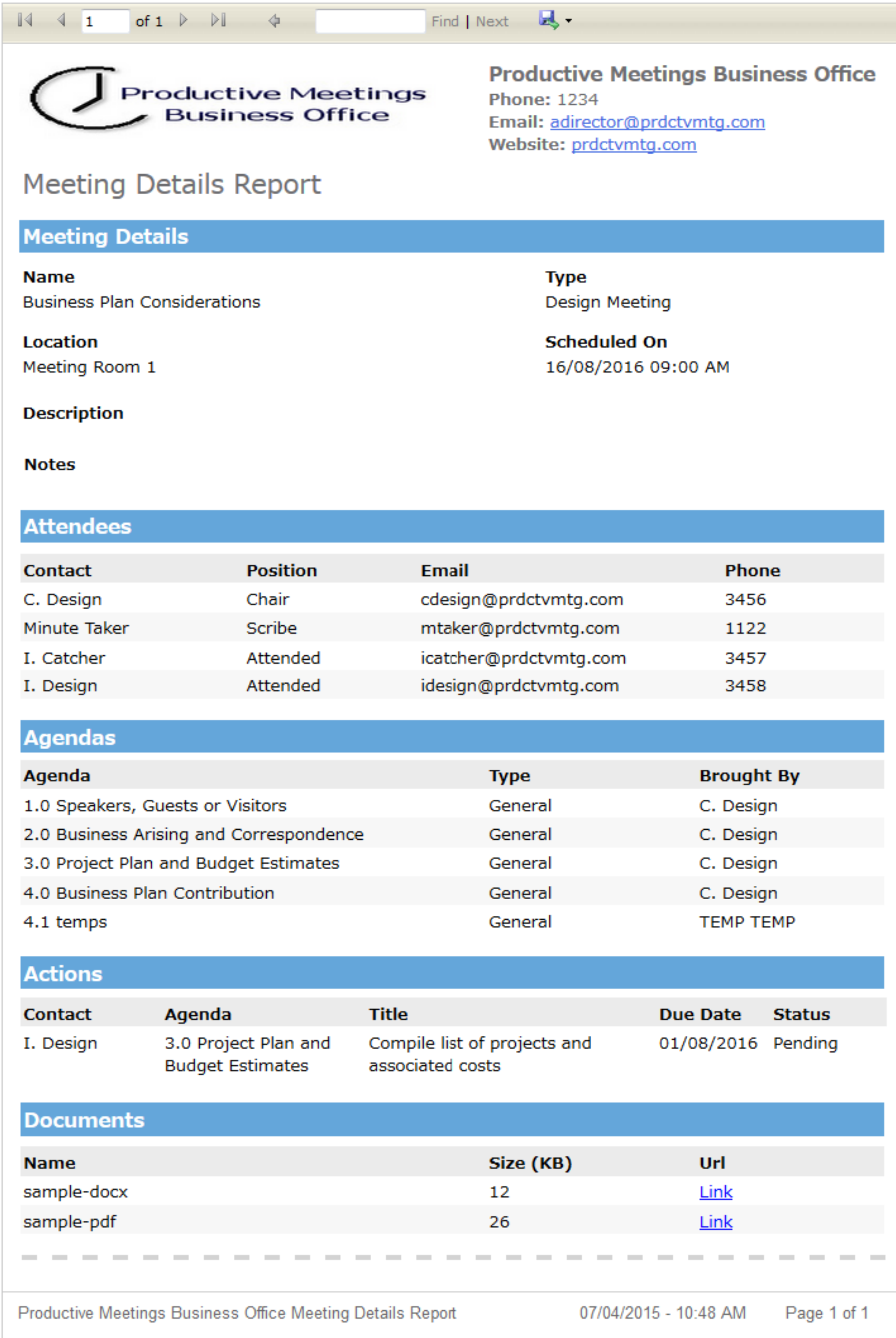
Selected Screen Buttons



Printing Reports

How to Print

Reports can be previewed and printed from the database via the various **Reports** Reports buttons. For instance the Meeting Details Report can be printed via the Meeting Detail screen. This and the other reports come up on screen in a new tab for previewing before printing.


1 of 1 Find | Next

Productive Meetings Business Office

Productive Meetings Business Office
Phone: 1234
Email: adirector@prdctvmtg.com
Website: prdctvmtg.com

Meeting Details Report

Meeting Details

Name
Business Plan Considerations

Type
Design Meeting

Location
Meeting Room 1

Scheduled On
16/08/2016 09:00 AM

Description

Notes

Attendees

Contact	Position	Email	Phone
C. Design	Chair	cdesign@prdctvmtg.com	3456
Minute Taker	Scribe	mtaker@prdctvmtg.com	1122
I. Catcher	Attended	icatcher@prdctvmtg.com	3457
I. Design	Attended	idesign@prdctvmtg.com	3458

Agendas

Agenda	Type	Brought By
1.0 Speakers, Guests or Visitors	General	C. Design
2.0 Business Arising and Correspondence	General	C. Design
3.0 Project Plan and Budget Estimates	General	C. Design
4.0 Business Plan Contribution	General	C. Design
4.1 temps	General	TEMP TEMP

Actions

Contact	Agenda	Title	Due Date	Status
I. Design	3.0 Project Plan and Budget Estimates	Compile list of projects and associated costs	01/08/2016	Pending

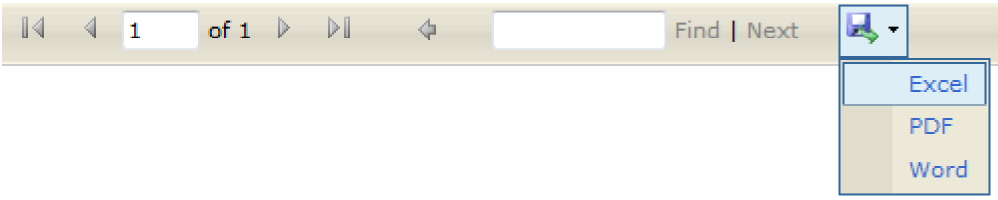
Documents

Name	Size (KB)	Url
sample-docx	12	Link
sample-pdf	26	Link

Productive Meetings Business Office Meeting Details Report 07/04/2015 - 10:48 AM Page 1 of 1

Toolbar Buttons

There are a number of buttons on the toolbar at the top of the screen that you might wish to use.



Options at the top of the report screen include:

Button	Image	Description
First Page		Navigate to first page of the report
Last Page		Navigate to last page of the report
Previous Page		Navigate to previous page of the report
Next Page		Navigate to next page of the report
Go Back to the parent report		Navigate back to the parent report
Zoom	100%	Increase view size of the report
Search Box		Enter a search string here and use Find or Next button.
Find	Find	To search for entered text
Next	Next	To find the next occurrence of the search string.
Save Button		To save report in the selected format – Microsoft Excel or Word, or Adobe PDF.
Refresh Button		To refresh report
Print Button		To print report