

Reports

**FinishLine Item Structure**

To fully understand FinishLine Reports, you must first understand something about the structure of the FinishLine database.

Whether you use FinishLine for punch lists, completion lists, QA/QC, checklists or whatever, the following principals apply.

When you create a punch or add to a completion list you are creating an ITEM.

Each ITEM contains a variety of field data, and, is linked to, at least, 2 Actions. 1 of the actions is what you want the project resource (sub) to do.

The other Action(s) sets the status of the ITEM typically to Complete.

The simplest example would be be:

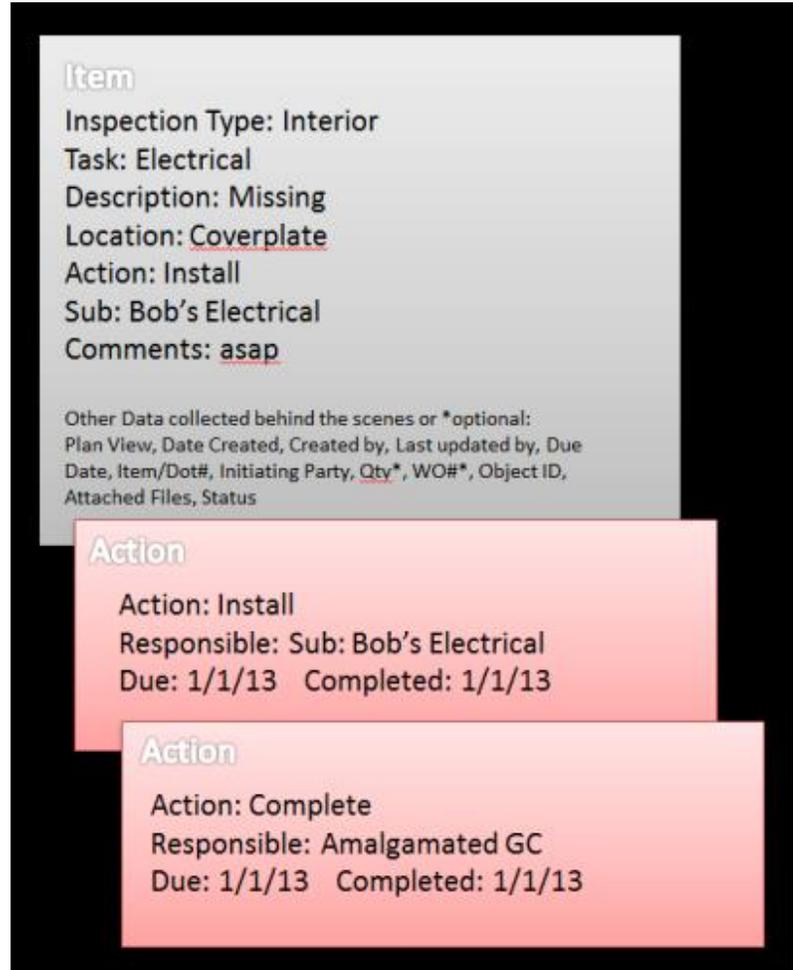
Inspection Type: Interior  
Task: Electrical  
Description: Missing  
Location: Cover Plate  
Action: Install  
Sub: Bob's Electrical

In this example, the ITEM is a Missing Cover Plate and the Action is "Install". However, there is another action called "Complete".

When the sub does the work, the "Install" action is completed by the system placing a date in the Date Completed field; and when the final authority marks the item complete, the "Complete" action is completed by the system placing a date in the Date Completed field.

**Note:** These two processes are done automatically with the Complete button or filling out completion information on the portal report.

FinishLine Item Structure



This is the simplest example. An item could have 2 or 20 or 200 actions.

Also actions can hold more than just the data above. In addition to the name, responsible sub, due date and completion date; you can store: qty, cost, markup rate, (calculated Total), Responsible User, Comments, User defined field which can be formatted as drop down, checkboxes, single/multi-line text, two option buttons etc. and most importantly other actions.

**Standard Reports**

By default FinishLine produces a report like this.

The report is sorted by sub-contractor, by Plan View/Unit. Each sub would receive a report of just their own items for each plan view.

The first line of the Data grid is information from the ITEM.

The second line of the Data grid is information from the Action.

NOTE: The "Complete" action is hidden from reports by default.

Hospital / Floor Plans / Floor2 / Area1 / 2A06-PresOffice - Doors r Us, LLC

ROOM 2A05

TOIL. 2A06A

PRES. OFFICE 2A06

ADMIN WORK 2A11

Responsible Sub

Plan View Name

Plan View

Data Grid

Item info

Action info

#	Unit / Item ID	Space	Location	Task	Type	Sub Contractor	Due Date	Status	Last Edit	Done?
26	2A06-PresOffice ID: 39561		Frame	D DOOR / D05-Frame	1-Interior	Doors r Us, LLC	05/01/13	Open	GC	
				Touch Up		Doors r Us, LLC	05/01/13	GC	No	
29	2A06-PresOffice ID: 39566		Frame	D DOOR / D05-Frame	1-Interior	Doors r Us, LLC	05/01/13	Open	GC	
				Repaint		Doors r Us, LLC	05/01/13	GC	No	

**Report Criteria**

**Item Criteria (Punch List tab)**

Following the theme of ITEM and ACTION(s), there are two tabs on the report criteria screen. Punch List/ITEM and Activity.

On the ITEM Tab you can select the following criteria:

- Plan View
- Task/Descriptions
- Status
- Inspection Type
- Initiating Party
- Sub-Contractor / including whether sub has involvement in Item/Action or Both
- Space
- Created by (initiating user)
- Comments
- Creation, Due or Complete Date

Also you can control the sort and grouping order, control page breaks, choose what information to display on the report and which report style you would like to use.

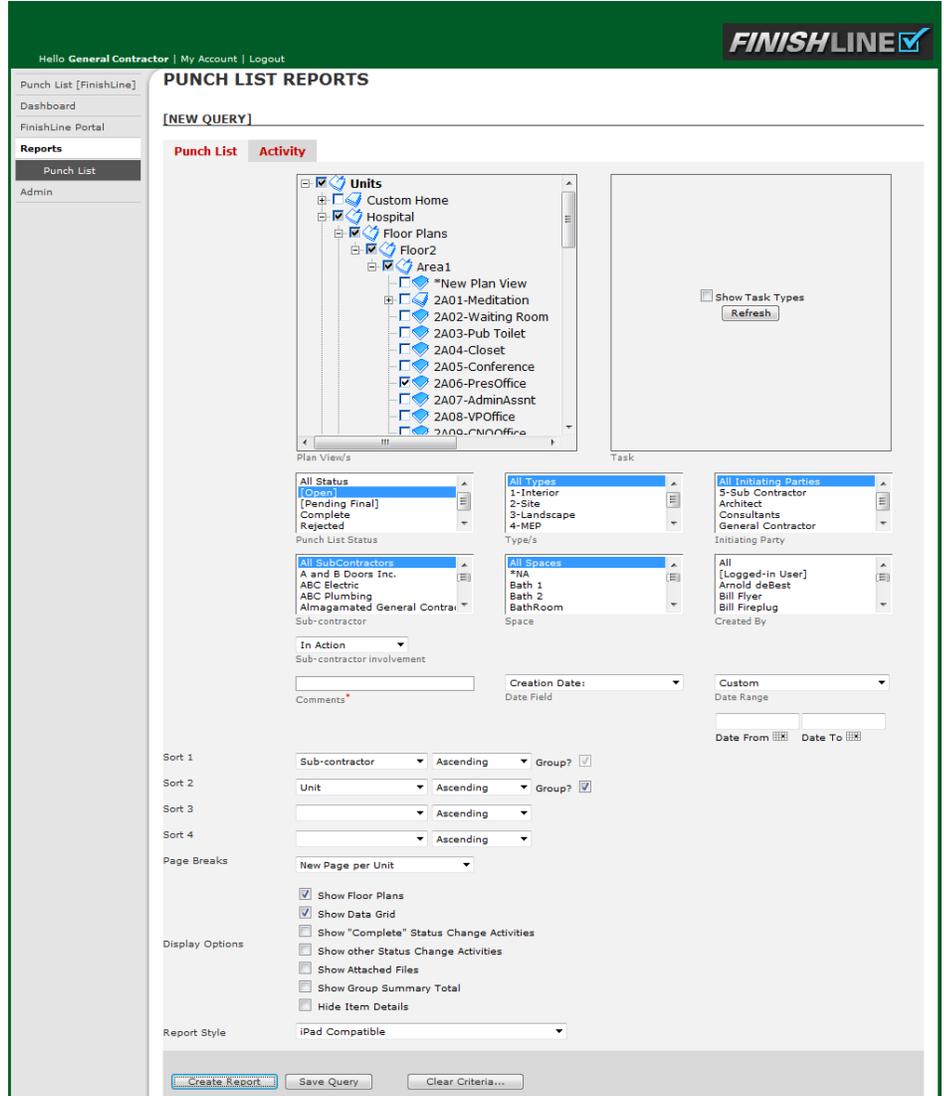
Finally there is the ability to Save the Query/Report to be easily recalled at a later date.

All the criteria are dynamic and applied in real time when recalled.

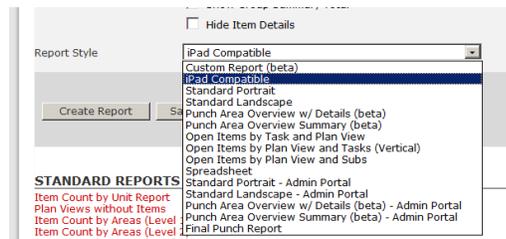
A report created and saved today will show the relevant data 1 year from now.

We highly recommend you start with the default settings and then experiment with the various criteria and format options.

**Punch List Tab – ITEM criteria**



NOTE: There are some Report Styles that work better than others on specific devices and under certain conditions. Others are formatted in such a way that they don't lend themselves to certain types of display options and sorting and grouping options. Generally the iPad Compatible and Custom Report are the most common and compatible in the most situations.



**Action Criteria (Activity Tab)**

You can add to the ITEM criteria by making alterations on the Activity Tab.

Be aware that as you add criteria, you are becoming more selective and limiting the information your report will show.

You can limit the report to Items with Actions that meet certain criteria.

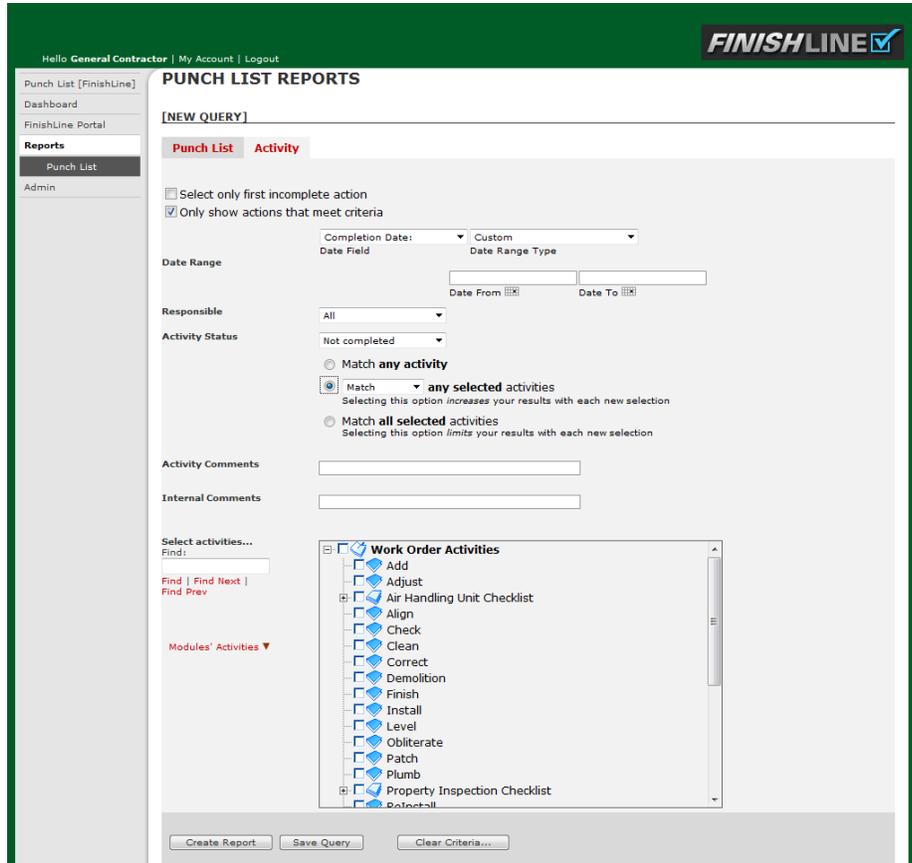
Date Criteria can be specific (Jan 1, 2013-Jan 31, 2013) or relative. Relative dates shift at the time that you create the report. If you use, for example, a relative date like “Today”. If you run the report a week from now, it will be for that day.

Other choices include:

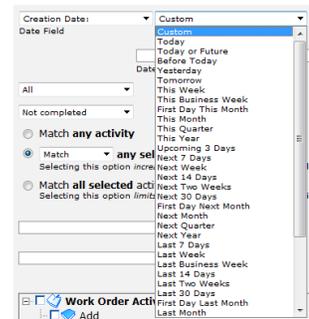
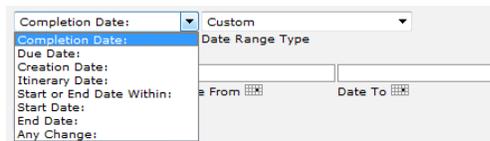
- Responsible user
- Action Status
- Whether to Match any Action
- Match selected Actions
- Don't match selected Actions or
- Match ALL selected (very limiting)
- Actions with specific comments

Again, it is important to experiment. As you add Action criteria to your ITEM criteria the number of records selected will be fewer and fewer.

**Activity Tab – Action Criteria**



**Action Date Criteria**



### Saving Reports

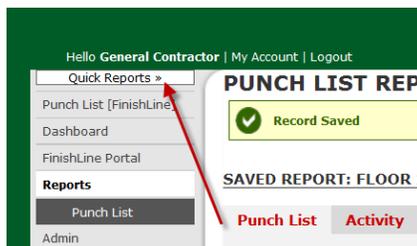
Any report/query criteria can be saved. Once saved you can retrieve the report and the data that you will see will be current / real time data.

The saved reports are listed at the bottom of the reports screen and can be Viewed, Edited or Deleted.

You choose whether the Report is Private or a Group Report and you choose which user groups can view the report from a list of Security Groups.

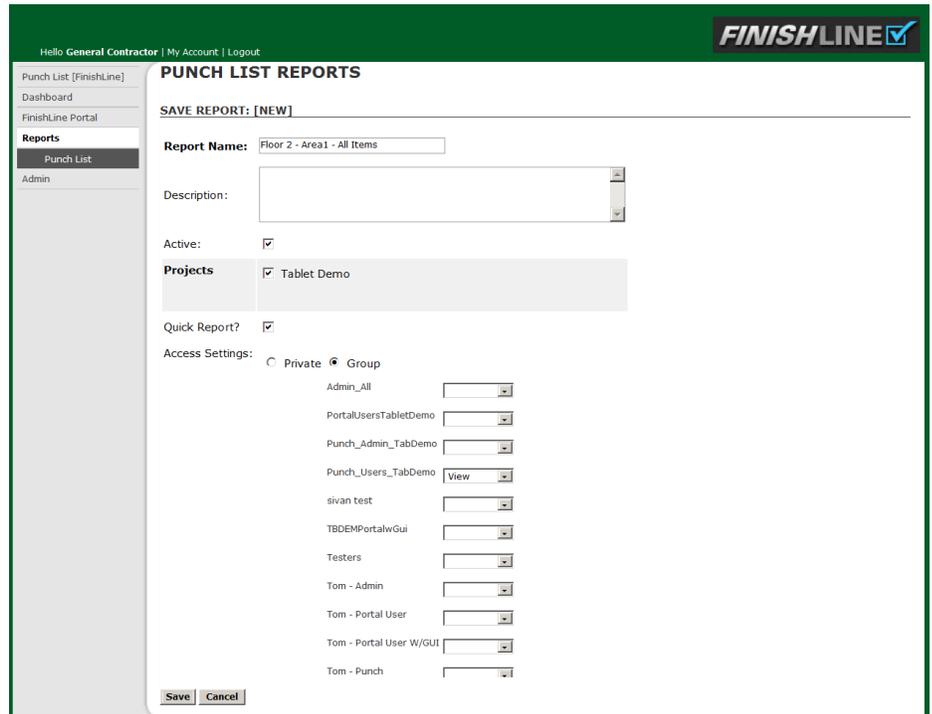


You can also save a report to be a Quick Report and they can be retrieved using the pull-down in the upper left labeled "Quick Reports"

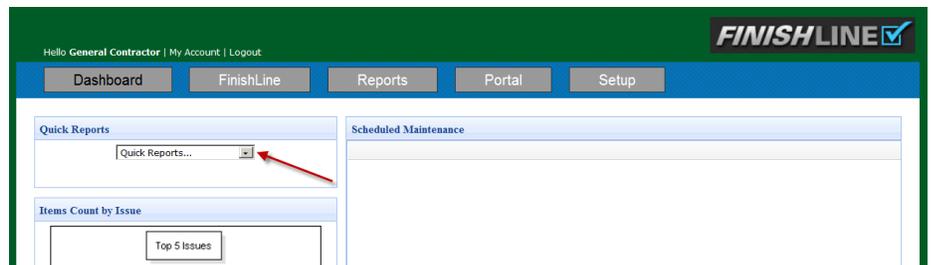


**Note:** When using dates in a saved report, use one of the relative date ranges like, This Month, Today, Last Week, This Quarter, etc.

### Saving Reports

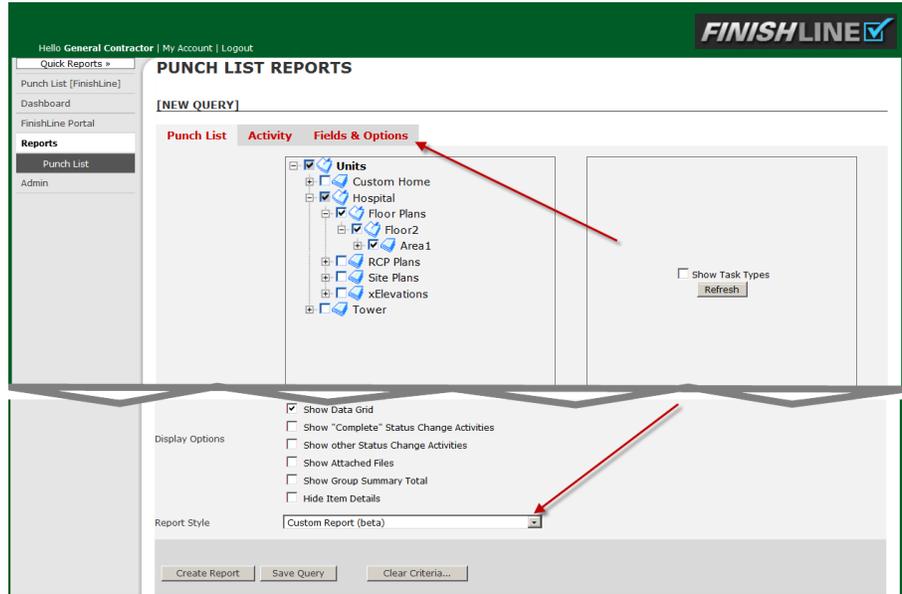


### Quick Reports on the Dashboard

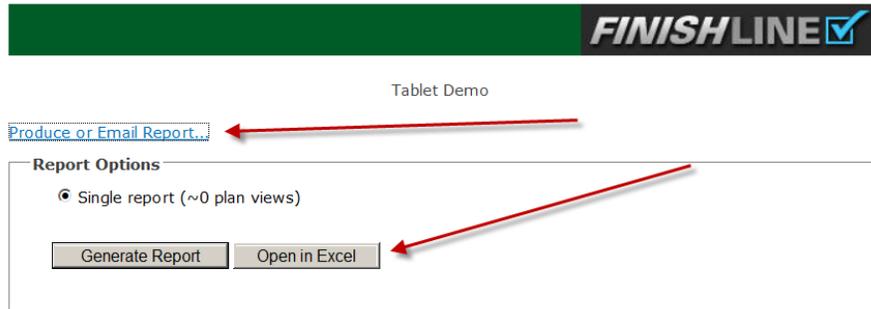


**Custom Report Style**

When you select the Custom Report Style FinishLine will present you with a third Tab, “Fields and Options”.



NOTE: When you “Produce or Email” a custom report one of the options will be to “Export to Excel”



04/30/13

#	Type	Task	Action	Sub Contractor	Comments	Date Created
1-	Interior	F- 1-Scratch/imperfection	Replace	Drywall Dudes Limited	deneme	3/19/13 10:48 PM
1-		F- 1-Scratch/imperfection	Replace	Drywall Dudes		4/11/13 10:48 PM

**Fields and Options**

This screen allows you select what data you see in what order from both Items and Actions.

By default, the Action data shows below the Item data but, you can show both Item and Action data on the same Row.

Each data element available can be turned on and off with the "Show" checkmark.

They can be given a custom label by typing it in the Label column.

You control the Column order by placing the numeric value in the Column order column.

Notes: The column order, as a best practice should be in 1,2,3,4 etc. in whole numbers, but you can squeeze in a column by numbering it with decimals. Example: 1.5 would be after 1 and before 2. Also if you want data on the same row from ITEMS and Actions be aware of the column order of each.

To Create a straight data output that looks like a spreadsheet do the following.

**ITEM Criteria Screen**

Sort 1 Blank out [dropdown] Ascending [dropdown] Group?

Sort 2 Unit [dropdown] Ascending [dropdown] Group?

Sort 3 [dropdown] Ascending [dropdown] Group?

Sort 4 [dropdown] Ascending [dropdown] Group?

Page Breaks New Page per Unit [dropdown] Uncheck

Display Options

- Show Floor Plans
- Show Data Grid
- Show "Complete" Status Change Activities
- Show other Status Change Activities
- Show Attached Files
- Show Group Summary Total
- Hide Item Details **Check to Hide**

Report Style Custom Report (beta) [dropdown]

**PUNCH LIST REPORTS**

[NEW QUERY]

Punch List Activity Fields & Options

Logo  Yes  No  
Show Logo on Produced Report?

Title Report Title [input]

Notes [input]

Report Notes (appears below the title) [input]

Item Fields

Show	Field	Label	Column Order
<input checked="" type="checkbox"/>	#	#	1
<input type="checkbox"/>	Icon	Icon	
<input checked="" type="checkbox"/>	Type	Type	2
<input checked="" type="checkbox"/>	Task	Task	3
<input type="checkbox"/>	Description	Description	
<input checked="" type="checkbox"/>	Action	Action	4
<input type="checkbox"/>	Location	Location	
<input type="checkbox"/>	Space	Space	
<input checked="" type="checkbox"/>	Sub Contractor	Sub Contractor	5
<input checked="" type="checkbox"/>	Comments	Comments <input type="checkbox"/> 2nd Line	6
<input type="checkbox"/>	Due Date	Due Date	
<input type="checkbox"/>	Initiating Party	Initiating Party	
<input type="checkbox"/>	Workorder #	Workorder #	
<input type="checkbox"/>	Quantity	Quantity	
<input type="checkbox"/>	Created By	Created By	
<input type="checkbox"/>	Updated By	Updated By	
<input checked="" type="checkbox"/>	Date Created	Date Created	7
<input type="checkbox"/>	Date Updated	Date Updated	
<input type="checkbox"/>	Completion Date	Completion Date	
<input type="checkbox"/>	Status	Status	
<input type="checkbox"/>	Plan View	Plan View	
<input type="checkbox"/>	Full Plan View	Full Plan View	
<input type="checkbox"/>	Plan Type	Plan Type	
<input type="checkbox"/>	ID	ID	
<input type="checkbox"/>	Select Action... [dropdown]	Data from an Action 1	
<input type="checkbox"/>	Select Action... [dropdown]	Data from an Action 2	
<input type="checkbox"/>	Select Action... [dropdown]	Data from an Action 3	
<input type="checkbox"/>	Select Action... [dropdown]	Data from an Action 4	
<input type="checkbox"/>	Select Action... [dropdown]	Data from an Action 5	

Actions Fields

Show Actions Fields in the same row as Item Fields

Show	Field	Label	Column Order
<input checked="" type="checkbox"/>	Action	Action	1
<input checked="" type="checkbox"/>	Variable Data	Variable Data	2
<input checked="" type="checkbox"/>	Due	Due	3
<input checked="" type="checkbox"/>	Subcontractor	Subcontractor	4
<input checked="" type="checkbox"/>	Comments	Comments	6
<input type="checkbox"/>	Last Updated	Last Updated	
<input type="checkbox"/>	Quantity	Quantity	
<input type="checkbox"/>	Cost	Cost	
<input type="checkbox"/>	Total Cost	Total Cost	
<input type="checkbox"/>	Date Created	Date Created	
<input checked="" type="checkbox"/>	Done	Done	5
<input type="checkbox"/>	Elapsed Time from Creation Date	Elapsed Time from Creation Date	
<input type="checkbox"/>	Lapsed Time from Due Date	Lapsed Time from Due Date	
<input type="checkbox"/>	Overage Charge	Overage Charge Overage rate: \$ [input] /Day Grace period: [input] Day/s <input type="checkbox"/> Show Only Overage Activities <input type="checkbox"/> Calculate from Item Due Date	

Markers on Plan  Icons  Shapes  
Show Icons or Shapes on floor plan?

Floor Plan Quality  Standard  High  
High quality plans will spread across the entire page

Plan Rendering Method  Standard  Alternative  
Use "Alternative" on plans that get corrupted when rendered

Create Report Save Query Clear Criteria...

**Custom Reports – Special Fields**

FinishLine can calculate specific information about Elapsed, Lapsed and Calculate overage charges for you.

Elapsed time and Lapsed time both take into account weekends and US Holidays. (these are not currently adjustable but will be on future releases)

Elapsed time is the time from the date an ITEM is created to the date it is completed **OR** the current date, if not completed. It is not used in the overage calculation but can be used for metrics reports.

Lapsed time is the time from the Due Date of the ITEM or Action, to Completion or the current date if the ITEM or Action isn't complete.

NOTE: Lapsed time CAN be and hopefully is a negative number in most cases. (The item should be done before the Due Date)

Overage Charge is a special calculated field. You can put in a daily overage amount and a Grace period if you want and FinishLine will calculate overage charges on, typically, overdue Punch items.

The two options are to force the calculation on the ITEM due date and to **ONLY** report on items that result in an overage charge (positive values after the calculation)

### Special Fields

<input checked="" type="checkbox"/> Done	Done	5
<input type="checkbox"/> Elapsed Time from Creation Date	Elapsed Time from Creation Date	
<input type="checkbox"/> Lapsed Time from Due Date	Lapsed Time from Due Date	
<input type="checkbox"/> Overage Charge	Overage Charge	
	Overage rate: \$ /Day	
	Grace period: Day/s	
	<input type="checkbox"/> Show Only Overage Activities	
	<input type="checkbox"/> Calculate from Item Due Date	

Markers on Plan  Icons  Shapes  
Show Icons or Shapes on floor plan?

Floor Plan Quality  Standard  High  
High quality plans will spread across the entire page

Plan Rendering Method  Standard  Alternative  
Use "Alternative" on plans that get corrupted when rendered

The overage calculation is:

For completed items:

Completion Date – Due Date – Weekend days – Holidays – Grace Period. If the resulting value is positive then value\*Overage rate = Overage Charge

For un-completed items:

Today's Date – Due Date – Weekend days – Holidays – Grace Period. If the resulting value is positive, then value\*Overage rate = Overage Charge

**Metrics Reports**

FinishLine has a variety of reporting options to meet most any need.

The Standard Reports listed below do some quick analysis. They are primarily Item counts and do not respond to Item or Action Criteria.

Several of the Standard reports have interactive controls that allow you to quickly compare areas, inspection types, Subs, Initiating Parties etc.

There are also some Report Styles that produce metrics reports. These styles do respond to the criteria.

- Open Items by Task and Plan View
- Open Items by Plan View and Tasks (V)
- Open Items by Plan View and Subs

Custom Reports can be configured to be used for export in Excel.



Tablet Demo: Item Count By Area - 07/30/2015 **Interactive**

Area	Completed Items	Open Items	Total	% Complete
Custom Home / 234 St. Lucia Ave	8	7	15	53.33%
Custom Home / 300 St. Kitts Ave.	1	2	3	33.33%
Hospital / Floor Plans	67	86	153	43.79%
Hospital / RCP Plans	8	25	33	24.24%
Hospital / Site Plans	1	14	15	6.67%
Hospital / xElevations	1	2	3	33.33%
Tower / Floor 01	32	39	71	45.07%
Tower / Floor 02	11	17	28	39.29%
Tower / Floor 03	9	30	39	23.08%
Tower / Floor 09	2	24	26	7.69%
<b>TOTAL</b>	<b>140</b>	<b>246</b>	<b>386</b>	<b>36.27%</b>

**Open Items by Task and Plan View**

**Metrics Reports - Continued**

Other examples of the Metrics reports

Open Items by Task and Plan View – Vertical

Open Items by Task and Plan View - Vertical



Tablet Demo

Level 1 ▼ Go Open in Excel

LOCATION/Task	Open	Pending Final	Completed	Total	% Pending Final	% Completed
<b>Custom Home</b>	<b>10</b>	<b>2</b>	<b>9</b>	<b>19</b>	<b>20%</b>	<b>47%</b>
B1-Safety Bar	0	0	1	1	0%	100%
CB03-Hardware	1	0	0	1	0%	0%
CL- 7 Grout	1	0	0	1	0%	0%
CP06-Frays @ edges	0	0	1	1	0%	100%
E- 1-Fixtures	0	0	2	2	0%	100%
E- 3-Fixture/element	1	1	1	2	50%	50%
F- 4-Exposed nail	0	0	1	1	0%	100%
F- 6-Visible joint	1	0	1	2	0%	50%
M- 4-Part	1	0	0	1	0%	0%
Air Handler	1	0	0	1	0%	0%
PL- 4-Caulk/recaulk fixture	1	0	0	1	0%	0%
In Wall	1	0	0	1	0%	0%
SF-EL-Cords-No Prong	1	0	1	2	0%	50%
SF-GEN-Tripping Hazard	0	0	1	1	0%	100%

Open Items by Plan View and Subs

Open Items by Plan View and Subs



Tablet Demo

Level 1 ▼ Go Open in Excel

LOCATION/Sub	Open	Completed By Sub	Cleared	Total	% Completed by Sub	% Cleared
<b>Hospital</b>	<b>127</b>	<b>26</b>	<b>77</b>	<b>204</b>	<b>20%</b>	<b>38%</b>
ABC Plumbing	4	0	1	5	0%	20%
Almagamated General Contracting	118	17	73	191	94%	38%
Civil Engineer Inc.	1	0	0	1	0%	0%
Concrete Constructors, Inc.	1	0	0	1	0%	0%
Doors r Us, LLC	13	0	13	26	0%	50%
Drywall Dudes Limited	31	11	12	43	26%	28%
Epoxy Royal, LLC	2	1	1	3	50%	33%
Fire Protect Builders, LLC	7	0	7	14	0%	50%
Framing Finishing and Done, LLC	2	0	0	2	0%	0%
Furniture Bath Accessories	10	1	5	15	7%	33%
General Electric Appliances	3	0	2	5	0%	40%
General Flooring Supply Inc.	11	2	8	19	11%	42%
Glazier Supply inc	0	0	1	1	0%	100%
Gynormus Plumbing and Mechanical	17	0	15	32	0%	47%
HVAC Mechanical Inc.	7	0	6	13	0%	46%
Heat Sealer Inc.	16	0	5	21	0%	24%
Iron and Steel Inc.	0	0	1	1	0%	100%
Millwork Specialties, LLC	10	0	3	13	0%	23%
QT Electric	16	4	13	29	24%	45%
Specialties Inc.	8	0	7	15	0%	47%
SureCoat Painting, Inc.	29	10	14	43	33%	33%
Whistle Blower Janitorial	2	1	4	6	17%	67%

Custom Reports can be configured to be used for export in Excel and further analysis.

FinishLine is constantly expanding and improving the report offerings. If you have a need or an idea for a report that is different, let us know.

Creating and Distributing Reports

Once you have all the criteria set the way that you want, you can Create the Report by clicking on Create Report below the criteria.

You can also Save the report Query by clicking on Save Query which is covered above.

The screenshot displays the 'PUNCH LIST REPORTS' interface. At the top, there is a user header 'Hello General Generic | My Account | Logout' and the 'FINISHLINE' logo. A left-hand navigation menu includes 'Quick Reports', '[FinishLine]', 'Dashboard', 'FinishLine Portal', and 'Reports' (with 'Punch List' selected). The main area is titled 'PUNCH LIST REPORTS' and contains a '[NEW QUERY]' section. It features a tree view for 'Units' with expandable folders for 'Condos', 'Floor 00', and 'Floor 01', and a list of units from 101 to 112. Below the tree are several filter and sort controls: 'Plan View/s' (All Status, [Open], [Pending Final], Complete, [None]), 'Status' (All SubContractors, ABC Cleaning, Above All Roofing, Almagamated General Contra, Blinds and Drapes), 'In Action' (Sub Contractor involvement), 'Comments', 'All Types' (1-Interior, 2-Exterior, 3-Site, 4-Safety), 'All Spaces' (\*NA, Balcony, Bath 1, Bath 2), '2-Design Team' (2-Developer, 3-Owner, 4-Architect, 5-Sub Contractor), 'Initiating Party' (All, [Logged-in User], Aimco Developer, Aimco General, Andrew Spotless), 'Creation Date' (Date Field), and 'Any' (Date Range). Sorting options include Sort 1 (Sub-Contractor, Ascending, Group?), Sort 2 (Unit, Ascending, Group?), Sort 3, and Sort 4. Page Breaks are set to 'New Page per Unit'. Display Options include checkboxes for 'Show Floor Plans', 'Show Data Grid', 'Show "Complete" Status Change Activities', 'Show other Status Change Activities', 'Show Attached Files', 'Show Group Summary Total', and 'Hide Item Details'. The Report Style is set to 'iPad Compatible'. At the bottom, there are three buttons: 'Create Report' (highlighted with a red arrow), 'Save Query', and 'Clear Criteria...'. The 'Create Report' button is highlighted with a red border.

Previewing Reports

Creating reports results in an on-screen preview of the report.

If you are satisfied with the content and format of the report, you can Produce it to a PDF and/or Email it out to the relevant parties.



FinishLine

Produce or Email Report... 02/18/14

100%

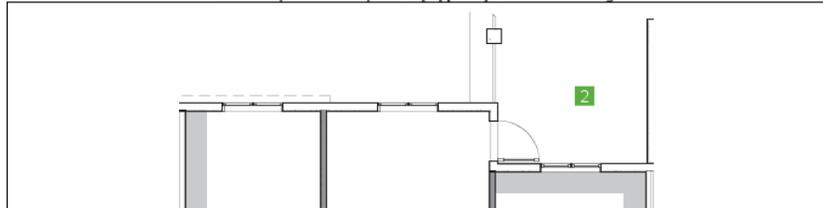
Condos / Floor 01 / 101 (Type A R) - ABC Cleaning



#	Unit / Item ID	Space	Location	Task	Type	Sub Contractor	Due Date	Status	Last Edit	Done?
1	101 ID: 58145	Bath 1	Throughout	Tile (T) / Dirty	1-Interior	ABC Cleaning	02/18/14	Open	AG	
			Clean			ABC Cleaning	02/18/14	AG	No	

02/18/14

Condos / Floor 01 / 104 (Type D) - ABC Cleaning



Producing and Emailing

When you produce the report FinishLine will create a PDF version of the report that can be opened, saved, or emailed to the involved parties.

In many cases your choice is to either produce a Single report or to Breakdown the report for each Sub-Contractor.

NOTE: Some reports, not sorted and grouped by Sub, don't allow the breakdown option.

### Single Report

**FINISHLINE** ✓

FinishLine

100%

[Produce or Email Report...](#)

**Report Options**

Single report (~22 plan views)

Breakdown report for each sub contractor

Generate Report

02/18/14

**Condos / Floor 01 / 101 (Type A R) - ABC Cleaning**

### Broken Down by each Sub-Contractor

**FINISHLINE** ✓

FinishLine

100%

[Produce or Email Report...](#)

**Report Options**

Single report (~22 plan views)

Breakdown report for each sub contractor

Sub Contractor	Email
Finishline Complete	tomorr@active3db.com
ABC Cleaning	ASpotless@XYZclean.com
Casey's Casework	Cboatman@CCasework.com
Peter's Plumbing	PPiper@Petesplumbing.com
Good Coat Painting	Porange@goodcoat.com
Drywall Dudes	Tjones@drwalldudes.com
See Thru Windows	Dglass@Seethru.com
Long Last Flooring	CWalking@LongLast.com
Pave the Way Concrete	HTheighth@PaveTheWay.com

Generate Report

02/18/14

**Condos / Floor 01 / 101 (Type A R) - ABC Cleaning**

Email Report

When you generate the report from the previous screen FinishLine creates the PDF's and prepares and individual email to each sub.

You can edit the Subject and Body of the email and cc: others by either typing the email address in the cc: box. You can cc: multiple email addresses by separating your email addresses with a semi-colon (;).

Also you can select both FinishLine sub-contractors and users from the cc: Select link. USE CTRL-CLICK to select multiple people from the list. NOTE: cc: addresses selected do not appear in the cc: box.



FinishLine  
Punch List Reports

**Report Options**

To	Recipient Name	Email	Attachment File
	ABC Cleaning	ASpotless@XYZclean.com	Report_ABC_Cleaning.pdf   View as HTML
	Casey's Casework	Cboatman@CCasework.com	Report_Casey_s_Casework.pdf   View as HTML
	Drywall Dudes	Tjones@drwalldudes.com	Report_Drywall_Dudes.pdf   View as HTML
	Finishline Complete	tomorr@active3db.com	Report_Finishline_Complete.pdf   View as HTML
	Good Coat Painting	Porange@goodcoat.com	Report_Good_Coat_Painting.pdf   View as HTML
	Long Last Flooring	CWalking@LongLast.com	Report_Long_Last_Flooring.pdf   View as HTML
	Pave the Way Concrete	HTheighth@PaveTheWay.com	Report_Pave_the_Way_Concrete.pdf   View as HTML
	Peter's Plumbing	PPiper@Petesplumbing.com	Report_Peter_s_Plumbing.pdf   View as HTML
	See Thru Windows	Dglass@Seethru.com	Report_See_Thru_Windows.pdf   View as HTML

CC: fred@fredmeyer.com; bill@senatebill.gov

Select

[Clear All Selected]

**Subcontractors**

- XYZ Cleaning: Andrew Spotless <ASpotless@XYZclean.com>
- Above All Roofing: David Chimney <Dchimney@AboveAll.com>
- Blinds and Drapes: Larry Coverton <LCoverton@BandD.com>
- Casey's Casework: Casey Boatman <Cboatman@CCasework.com>
- Drywall Dudes: Tim Jones <Tjones@drwalldudes.com>
- Finishline Complete: Tom Orr <tomorr@active3db.com>
- Going Up Elevators: Oscar Tothetop <OTtothetop@goingup.com>
- Good Coat Painting: Pete Orange <Porange@goodcoat.com>
- Interior Designs: Rusty Anchor <RAnchor@InteriorDesign.com>
- Keep em Safe: Dewnot Letemin <DLetemin@Keepemsafe.com>
- Keepin it Green Landscapes: Jennifer Greenthumb <JGreenthumb@KeepGreen.com>
- Long Last Flooring: Charlie Walking <CWalking@LongLast.com>
- MMM Acoustics: Herman Louder <HLouder@MMMAcoustics.com>

Subject: FinishLine Punch List Report

Body: Please see the attached report.



Congratulations



FinishLine  
Punch List Reports

**REPORT SENT!**

Scheduling Reports for Automatic Notification

To add an automatic notification you can Edit the Criteria of any saved report and “re”-save it or if it is a new report save the report and fill out the bottom part of the screen. (see below)

These two bottom screens work together.

In the top section you need to define who the report will go to. A single report to an individual, or broken out to the various subs.

The lower section sets the schedule and who you want the email to be from. (typically yourself) . Pick a starting date and time and then an interval and whether or not you want the recipient to acknowledge. (not recommended unless the interval is very short. This is for emergency notification. (if Task/Description = Water Leak, then notify every 5 minutes until you get an acknowledgement back from the plumber that he is on his way))

FinishLine checks through your reports that have auto-notification every few minutes and sees if any of the reports results in records that match the criteria of the report. If no records are found it doesn't do or send anything. If the report results in records found, it will send a notification based on the schedule.

The screenshot shows two stacked configuration panels. The top panel, titled "Default Email Options", contains radio buttons for "Single Report to:" (selected) and "Divided Report to Involved Subs". Below are input fields for "CC", "Subject", and "Body". The bottom panel, titled "Automatic Notifications", has a checkbox for "Turn On Automatic Notifications". It includes a "Send from" dropdown menu showing "(mkuse@findorff.com)", a "Start On" date and time picker, an "Interval" dropdown menu set to "Once", and "Request Acknowledgement?" radio buttons with "Yes" selected. A note below the acknowledgement options states: "Note: Acknowledgement is recommended only for reports that are sent on a short interval. Once a report is acknowledged, any item contained in the report will not be emailed again through the automatic notifications system." "Save" and "Cancel" buttons are at the bottom.

**NOTE:** We don't enthusiastically recommend using Automatic Notifications. The problem we have with automatic anything is that an action is taken without human review. If you are confident of the results you are welcome to give it a go.