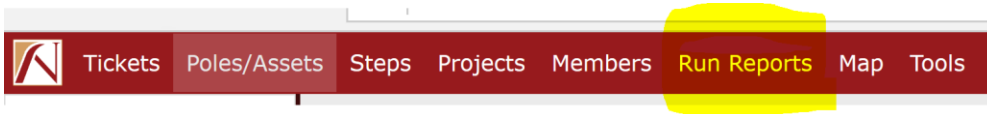


Running a PT+ Next to Go Report

There are two PT+ Next to Go Reports.

1. PT+ Next to Go Report – Step Member
 2. PT+ Next to Go Report – Pole Owner
- The Step Member version will return all tickets where the member code(s) provided are next to go.
 - The Pole Owner version will return tickets where the member code(s) provided are listed as the pole owner on tickets and will display who is next to go on those tickets.

To run the report select it from **Run Reports**



Double click to open one of these reports

A screenshot of the 'Run Reports' dialog box. At the top, there's a tab labeled 'Run Reports x'. Below it, there are input fields for 'Name' (containing 'PT+ Next to Go'), 'Code', 'Group' (a dropdown), and 'Updated After' (a date picker). There are 'Search' and 'Clear' buttons. Below these fields is a '» Run' button. At the bottom, there's a table with three columns: 'Group', 'Name', and 'Description'. The table contains two rows, both highlighted with yellow. The first row has 'General' in the Group column, 'PT+ Next To Go Report - Step Member' in the Name column, and 'This report is designed for a' in the Description column. The second row has 'General' in the Group column, 'PT+ Next To Go Report - Pole Owner' in the Name column, and 'This report is designed for l' in the Description column.

Click the Select icon to select member codes.

A screenshot of the 'Input parameters & run report' dialog box. At the top, there's a tab labeled 'Input parameters & run report x'. Below it, there's a section for 'Next To Go Member' with a yellow 'Select' button and a 'Clear' button. Below this are several input fields: 'Ticket Type', 'State', 'County', 'Place', and 'Job Type'. The 'Job Type' field has 'Select' and 'Clear' buttons. At the bottom, there are four date pickers: 'Next To Go Start Date From', 'Next To Go Start Date To', 'Ticket Created Date From', and 'Ticket Created Date To'. At the very bottom, there are '» Run report' and 'Cancel' buttons. The 'Run report' button is highlighted.

From the Member code box, you can search for codes by different ways: Code, Company Name, State, etc.

The screenshot shows the 'Member' search interface. At the top, there's a red bar with a filter icon and the text 'Filter: Name/Code'. Below this, there are several search criteria: 'Member code' (highlighted in yellow) with a 'contains' dropdown and an empty text box; 'Name' (highlighted in yellow) with a 'contains' dropdown and an empty text box; 'Company' with an equals sign dropdown and a dropdown menu showing '...'; 'State' (highlighted in yellow) with an equals sign dropdown and a dropdown menu showing '...'; 'Is active' with an equals sign dropdown and a dropdown menu showing 'Yes'; 'Ticket Email' with a 'contains' dropdown and an empty text box; 'Primary contact name' with a 'contains' dropdown and an empty text box; 'County' with a dropdown menu showing '...'; and 'Description' with a 'contains' dropdown and an empty text box. At the bottom, there's a search bar with a magnifying glass icon and the text 'Search', a link 'Add search condition', a settings gear icon, a 'Show rows' dropdown set to '500', and a checkbox for 'Full-Text Search'.

For example, if you want to run the report for several codes, searching them by company might be easier than typing each individual code.

Example below is showing the company of NJUNS being searched and several member codes selected.

The screenshot shows the 'Member' search interface with the 'Name' filter set to 'NJUNS' (highlighted in yellow). The search results are displayed in a table with 19 rows. The table has four columns: 'Name', 'Member code', 'Contact', and 'Description'. The first row is highlighted in red and shows 'NJUNS, KCPL' as the Name, 'UPCKC' as the Member code, 'Angie Weaver' as the Contact, and 'NJUNS Training Code - Default PT Mask, KCP&L PA mask' as the Description. Other rows include 'NJUNS, Inc.' with various member codes and descriptions. At the bottom of the table, there are 'Select' and 'Cancel' buttons (the 'Select' button is highlighted in yellow).

The codes are now showing in the report parameters. (State and Job Type are not required) Click Run Report.

The screenshot shows the 'Input parameters & run report' dialog box. It has a title bar with a close button. The first section is 'Next To Go Member' with a 'Select' button (highlighted in red) and a 'Clear' button. Below this, there's a list of member codes: 'UPCKC', 'UPCOR', 'UPC2', and 'UPC3', each followed by a red 'x' icon. The next section is 'State' with an empty text box and a dropdown menu showing '...'. The next section is 'Job Type' with a 'Select' button and a 'Clear' button. At the bottom, there are 'Run report' and 'Cancel' buttons (the 'Run report' button is highlighted in yellow).

If only one code is needed, typing the code into the Member code contains box is quicker. Click Search to find it and double click to select or highlight the row and click the select icon in the bottom left.

Member

Filter: Name/Code

Member code contains **UPC2** Name contains Company = Ticket Email contains

State = Is active = Yes Primary contact name contains County Description contains

Search Add search condition Show rows 500 Full-Text Search

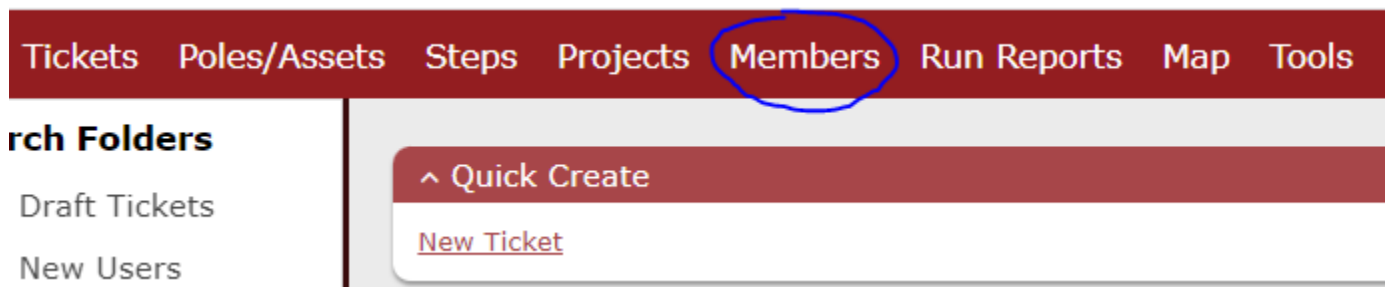
Create Edit Excel Report Add to set 1 row

Name	Member code	Contact	Description
NJUNS, Inc.	UPC2	Angie Weaver	NJUNS Training Code - Default PT Mask, Default PA mask

Select Cancel

The codes that are in the user profile can also be easily selected by running the **My Members** filter.

Click on Members at the top.



Select the drop-down arrow next to the search icon and choose My Members. Then click the Search icon to run this filter.

Filter: Name/Code

Member code contains State = Primary contact name contains

Search Add search condition

<Reset filter> Filter By County **My Members** NJUNS UPC codes Name/Code ent codes

Create Excel Report

Name	Member code	Contact	Description
123.net			

This will return the codes that are in the user profile.

Highlight the codes needed and click the Select icon.

Filter: My Members

Search [Add search condition](#) Show rows 100

Create Edit Excel Report Add to set

Name	State	Member code	Contact	Ticket En
NJUNS - Arkansas Test/Demo Code	Georgia	ARKTST	Angie Weaver	aweaver
NJUNS, Inc	Georgia	BSTADM	Angie Weaver	aweaver
NJUNS, Inc.	Georgia	NJUNS1	Angie Weaver	aweaver
NJUNS, Inc.	Georgia	NJUNSA	Angie Weaver	njuns@n
NJUNS Oversize Load	Georgia	OLUPC	Angie Weaver	aweaver
NJUNS PA Test	Massachu	PATEST	Angie Weaver (MA)	aweaver
NJUNS Permit Authority	Georgia	PERMIT	Angie Weaver	aweaver
NJUNS, Inc	Georgia	SYSTES	Angie Weaver	aweaver
NJUNS, Inc	Georgia	UPC	Angie Weaver	aweaver
NJUNS, Inc.	Georgia	UPC2	Angie Weaver	aweaver
NJUNS, Inc.		UPC3	Mandy Johnson	aweaver
NJUNS, Four	Pennsylva	UPC4	Angie Weaver (PA)	aweaver
NJUNS, Inc	Georgia	UPC6	Angie Weaver	aweaver
NJUNS Test	Georgia	UPC7	Angie Weaver	aweaver

✓ Select Cancel

Select Run Report (unless other parameters are needed and if so, complete those first)

Input parameters & run report

Next To Go Member

ARKTST ✕ BSTADM ✕ NJUNS1 ✕ NJUNSA ✕
OLUPC ✕ PATEST ✕ PERMIT ✕ SYSTES ✕ UPC ✕

Ticket Type

State

County

Place

Job Type

Next To Go Start Date From

Next To Go Start Date To

Ticket Created Date From

Ticket Created Date To

» Run report Cancel