

# USER PRODUCTIVITY/SUMMARY REPORTS

## STEP 1

The screenshot displays the NORTEC web application interface. At the top, the logo features a compass rose with the letter 'N' and the word 'NORTEC' in a stylized font. Below the logo is a navigation bar with the following items: 'My Portfolio', 'Add', 'Email', and 'Reports'. The 'Reports' item is circled in green. A speech bubble points to the 'Reports' menu with the text: '1) Under Reports main menu option, select Custom Reports.' Below the navigation bar is a 'Reports' section with a green header. This section contains five report options, each with an icon and a description:

- Custom Reports**: Custom reports (Icon: Document with gears)
- Geographic Reports**: Predefined reports by geography (Icon: Document with map)
- Industry Sector Reports**: Predefined reports by industry sector (Icon: Document with red gear)
- Power Search**: User defined, multi-click searches (Icon: Document with lightning bolt)
- Timeline Reports**: Predefined reports by time (Icon: Document with clock)

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## STEP 2

The screenshot displays the NORTEC web application interface. At the top, there is a navigation bar with the NORTEC logo (a compass rose with the letter 'N') and the text 'NORTEC'. Below the logo, there are navigation links: 'My Portfolio', 'Add', 'Calendar', 'Email', and 'Reports'. A search bar is located on the right side of the navigation bar.

The main content area is titled 'Custom Reports'. On the left side, there is a dropdown menu with the following options: 'Data Freshness', 'Summary Report (By Type)', and 'Summary Report (By Contact)'. The 'Summary Report (By Contact)' option is highlighted in yellow.

Below the dropdown menu, there is a horizontal bar with the text 'Select export format' and a dropdown arrow. To the right of this bar are the 'Export' button, a refresh icon, and a print icon.

A green speech bubble callout points to the 'Summary Report (By Contact)' option in the dropdown menu. The text inside the speech bubble reads: '2) In Custom Reports, select Summary Report (by contact).'

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## STEP 3

3) Select date, geographic and user criteria. Then click Preview button.

My Port Calendar Email Reports

Custom Reports

Summary Report (By Contact) Start date 8/1/2012 End date 8/31/2012 All items checked Michelle Clement Preview

Michelle Clement

- Melissa Willis
- Michelle Clement
- Misty Bowman
- Morgan Mojarro

Select export format Export Print

# USER PRODUCTIVITY/SUMMARY REPORTS

## STEP 4

**NORTEC**

My Portfolio Add Calendar Email Reports

**Custom Reports**

Summary Report (By Contact) Start date 8/1/2012 End date 8/31/2012 All items checked Michelle Clement Preview

1 of 1 Select export format Export

### Summary Report

**Contact Names**

Expand/collapse all

Contact Names	Total	Total
Michelle Clement		50
Action Item	10	
Company	6	
Contact	13	
File	10	
Journal Entry	1	
Metrics Survey	10	

4) User detail is provided with +/- options to expand content.

# USER PRODUCTIVITY/SUMMARY REPORTS

## STEP 5

**NORTEC**

My Portfolio   Add   Calendar   Email   Reports

**Custom Reports**

Summary Report (By Contact)   Start date 8/1/2012   End date 8/31/2012   All items checked   Michelle Clement   Preview

1 of 1   Select export format   Export

**Summary Report**

Contact Names	Total		
Expand/collapse all			
Michelle Clement	Total		50
Action Item	1		
Company	6		
Name		Date	
Girls With Guns		8/2/2012	
River Oaks Home Owners Association		8/3/2012	
Clayton Homes		8/6/2012	
Test as Michelle		8/6/2012	
Fake Company		8/16/2012	
Red Bluff Auto Sales		8/29/2012	

5) Each entry provides hyperlinking to relevant content.