INEIGHT

# REPORTS USER GUIDE

DOCUMENT

Release 26.3
Revision: 5
Last Updated: 04 September 2026

Information in this document is subject to change without notice. Companies, names and data used in examples are fictitious.

Copyright ©2026 by InEight. All rights reserved. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express permission of InEight.

Microsoft Windows, Internet Explorer and Microsoft Excel are registered trademarks of Microsoft Corporation.

Although InEight Document has undergone extensive testing, InEight makes no warranty or representation, either express or implied, with respect to this software or documentation, its quality, performance, merchantability, or fitness for purpose. As a result, this software and documentation are licensed “as is”, and you, the licensee are assuming the entire risk as to its quality and performance. In no event will InEight be liable for direct, indirect, special, incidental or consequential damages arising out of the use or inability to use the software or documentation.

Release 26.3
Revision: 5
Last Updated: 04 September 2026

*This page intentionally left blank.*

# CONTENTS

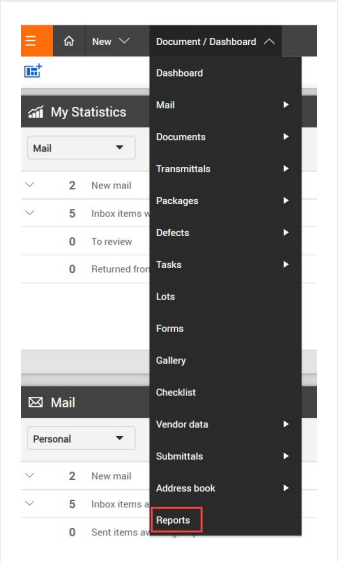
CHAPTER 1 – RUNNING REPORTS ..... 7
1.1 Scheduling of Reports ..... 9
1.2 Disable or enable scheduled reports ..... 10
1.3 Creating Favorite Reports ..... 10
CHAPTER 2 – CUSTOMIZING REPORTS ..... 13
CHAPTER 3 – MAIL REPORTS ..... 15
CHAPTER 4 – DOCUMENT REGISTER REPORTS ..... 17
CHAPTER 5 – TRANSMITTAL REPORTS ..... 19
5.1 Form Reports ..... 21
CHAPTER 6 – DOCUMENT WORKFLOW REPORTS ..... 23
CHAPTER 7 – PACKAGE REPORTS ..... 27
CHAPTER 8 – TASKS REPORTS ..... 29
CHAPTER 9 – ADMINISTRATION REPORTS ..... 31
9.1 Submittal reports ..... 33

*This page intentionally left blank.*

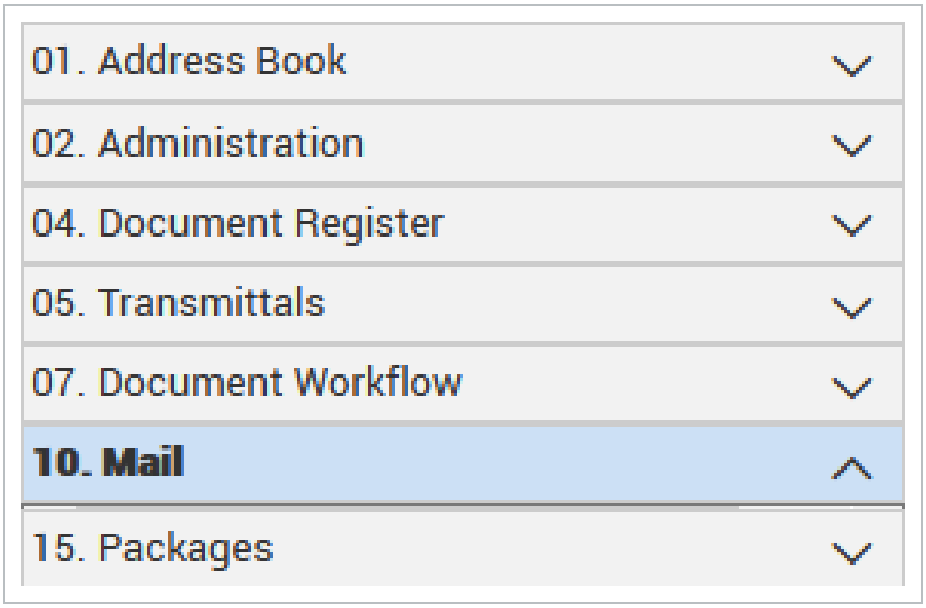
# CHAPTER 1 – RUNNING REPORTS

There are a number of standard reports available within InEight Document. The Standard reports are accessed using the steps below.

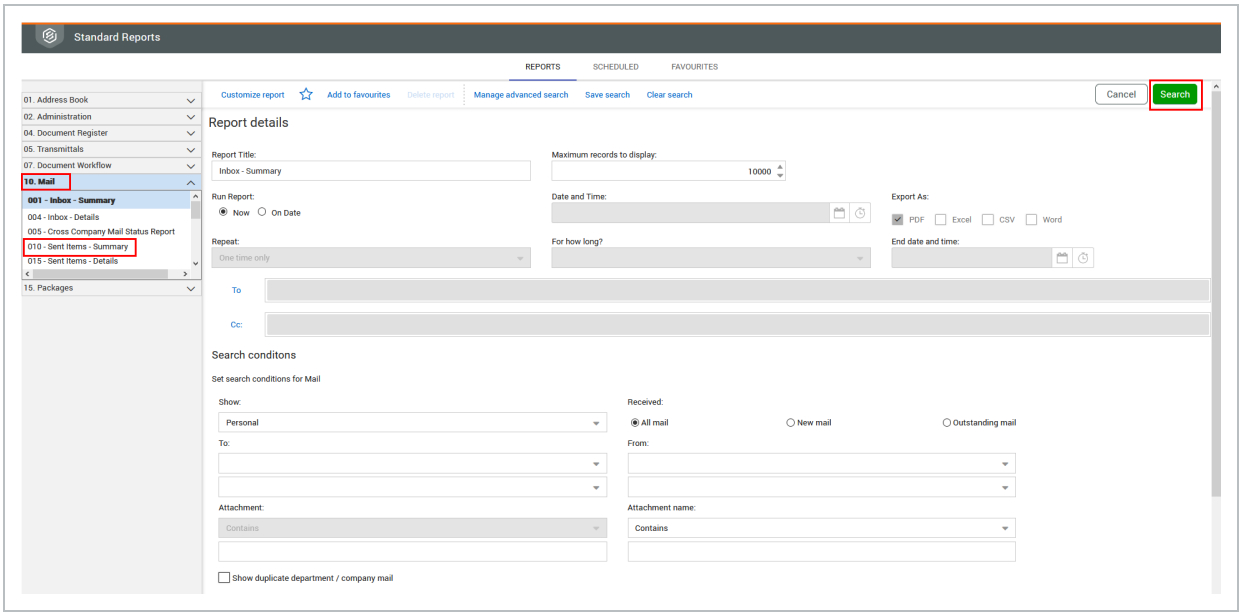
1. Select **Reports** from the module drop-down menu.



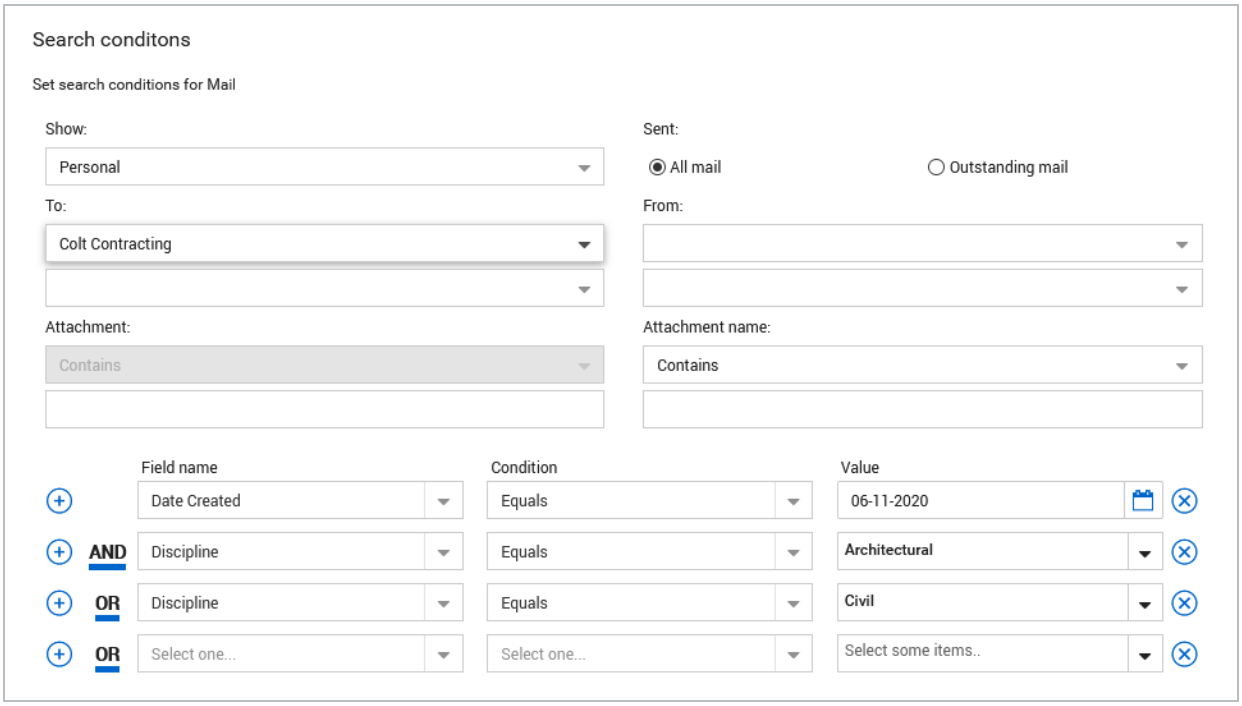

2. The available Report types are listed in the left hand pane:



3. Select the report type to see the list of related reports.
4. Click the required report.




5. Enter/select the required attribute options for the report on the right hand side of the screen (in a similar way to using the Advanced search window).




6. Click **Search** to run the report.

7. Click **Export** and select Excel, PDF or Word to export to the relevant format. To print the report select the **Print** button (available in Internet Explorer only).

8. Use the search box and **Find/Next** options at the top of the report window to search within the report output on screen.

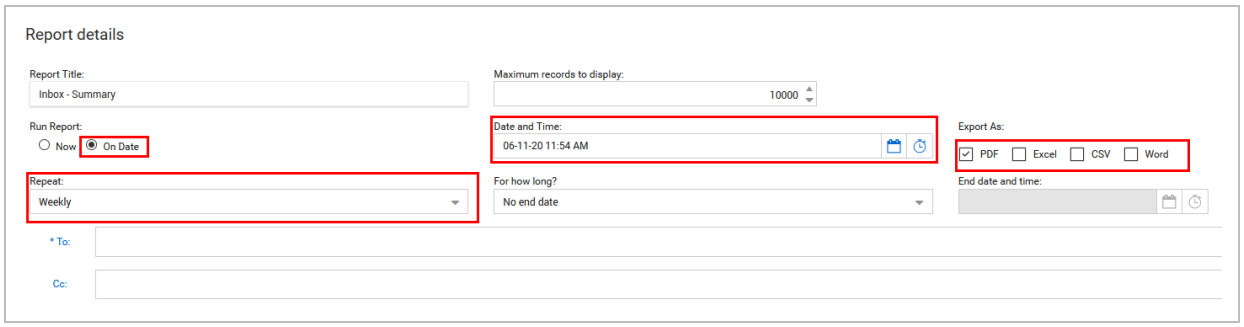
> Inactive contacts will only be listed on Mail, Address book and Admin reports if they are ticked in the Address book to be included in reports.

# 1.1 SCHEDULING OF REPORTS

Frequently used reports can be scheduled to run automatically at pre-defined intervals and distributed to a nominated group of recipients. For large and complex reports that take more than a few minutes to generate, it is possible to generate reports offline, removing the potential impact on other users by minimizing the impact on system performance.

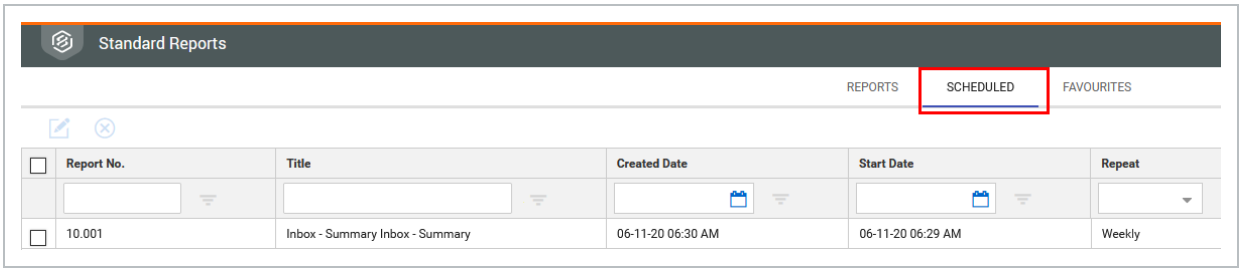
**To schedule a new report:**

1. Select the report you wish to schedule.
2. Change the **Run** Report option from **Now** to **On Date**.




3. Choose the file format for exporting.
4. Select the repeat option as Weekly, Monthly etc. with an **until** or **on** date.
5. Select the scheduled report recipients using the **To:** and **CC:** fields.
6. Click the **Search** button to schedule the report based on the above options.

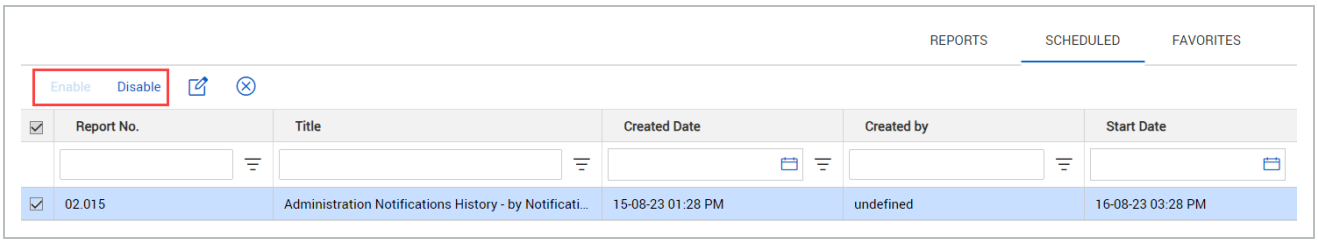
7. To see a list of schedule reports (and/or modify any of them), use the **Scheduled** tab at the top of the Standard Reports generation window.




# 1.2 DISABLE OR ENABLE SCHEDULED REPORTS

After a user has left the company, their scheduled reports can remain in the Reports module. If the applicable security access has been granted, an Administrator can disable scheduled reports. See Delegating Admin Functions for a Security Groupfor information about the Enable/Disable scheduled Reports setting.

When you have been given access to all reports in the company, the Enable and Disable buttons show in the left toolbar. To disable a report, select it, and then click **Disable**. The report is disabled and will not run at the scheduled time.



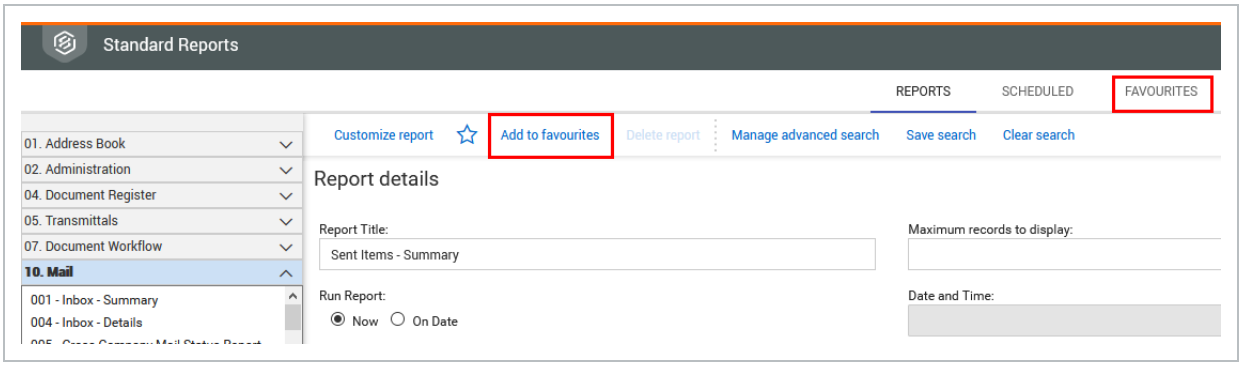

To enable a report, select it, and then click **Enable**.

# 1.3 CREATING FAVORITE REPORTS

Favorite reports can be defined at a Server, Project, Company or User level using the Favorites Tab in the Reports module.

**To add a Favorite report:**

1. Within the Reports module, select the report you want to add.
2. Click the **Add to Favorites** button above the report scheduling options.




3. Give the report a meaningful title and set the visibility of the report (based on access permissions).
4. Click on the Favorites tab to access reports marked as Favorites.

- Reports marked as Favorites for **My project** by Project Administrators are added to the list of **Favorites** for all users on a project.
- Reports marked as Favorites for **My project** added by Project or Company Administrators are added to the list of **Favorites** for all users within the same company.
- Reports marked as Favorites for **Myself** can be added by any users and appear only on their own **Favorites** list.

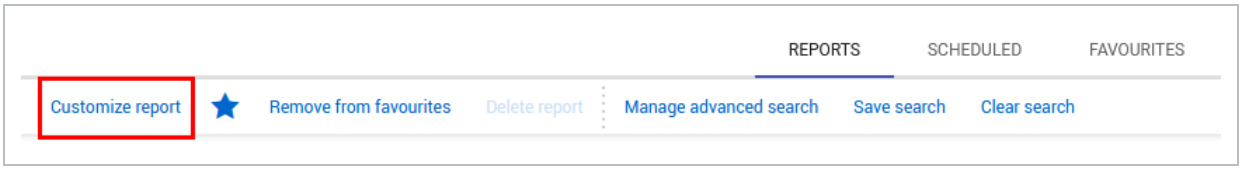
*This page intentionally left blank.*

# CHAPTER 2 – CUSTOMIZING REPORTS

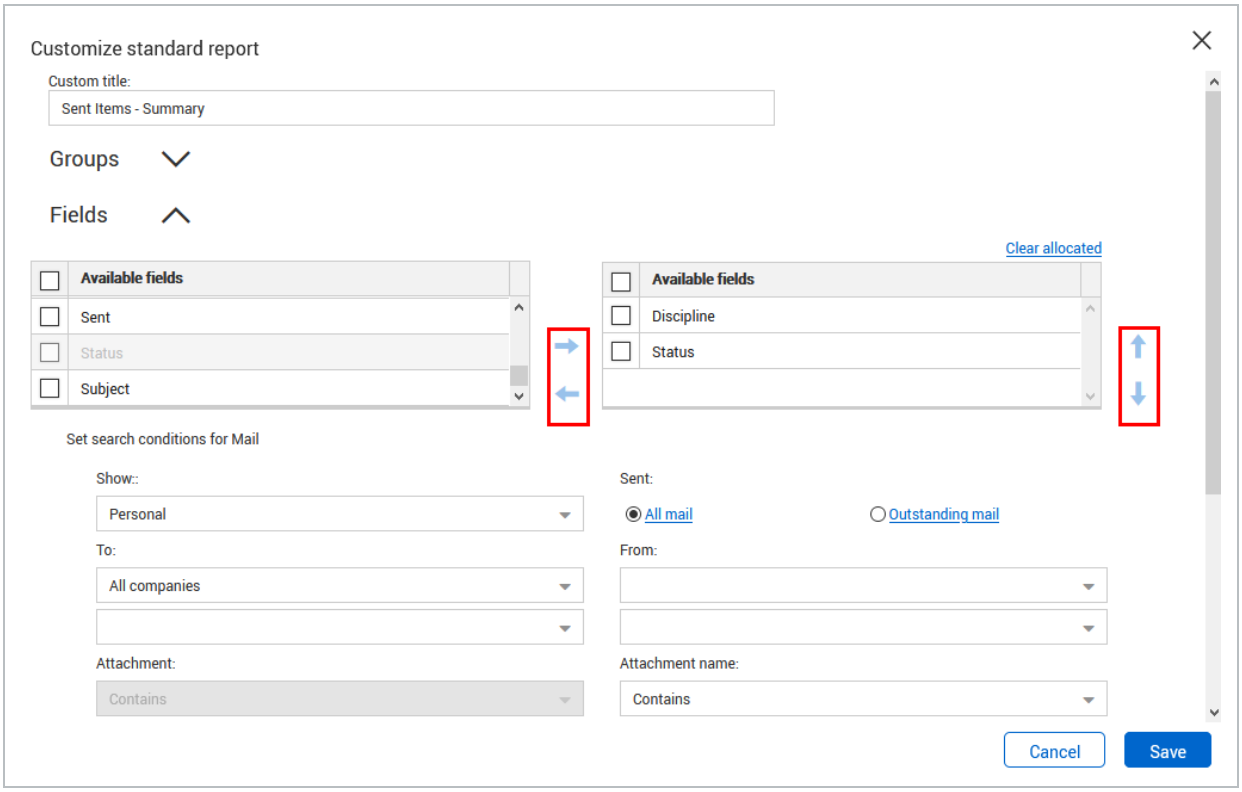
Standard Reports can be customized to a limited extent to meet company specific requirements.

**To customize a report**, from the Reports window**:**

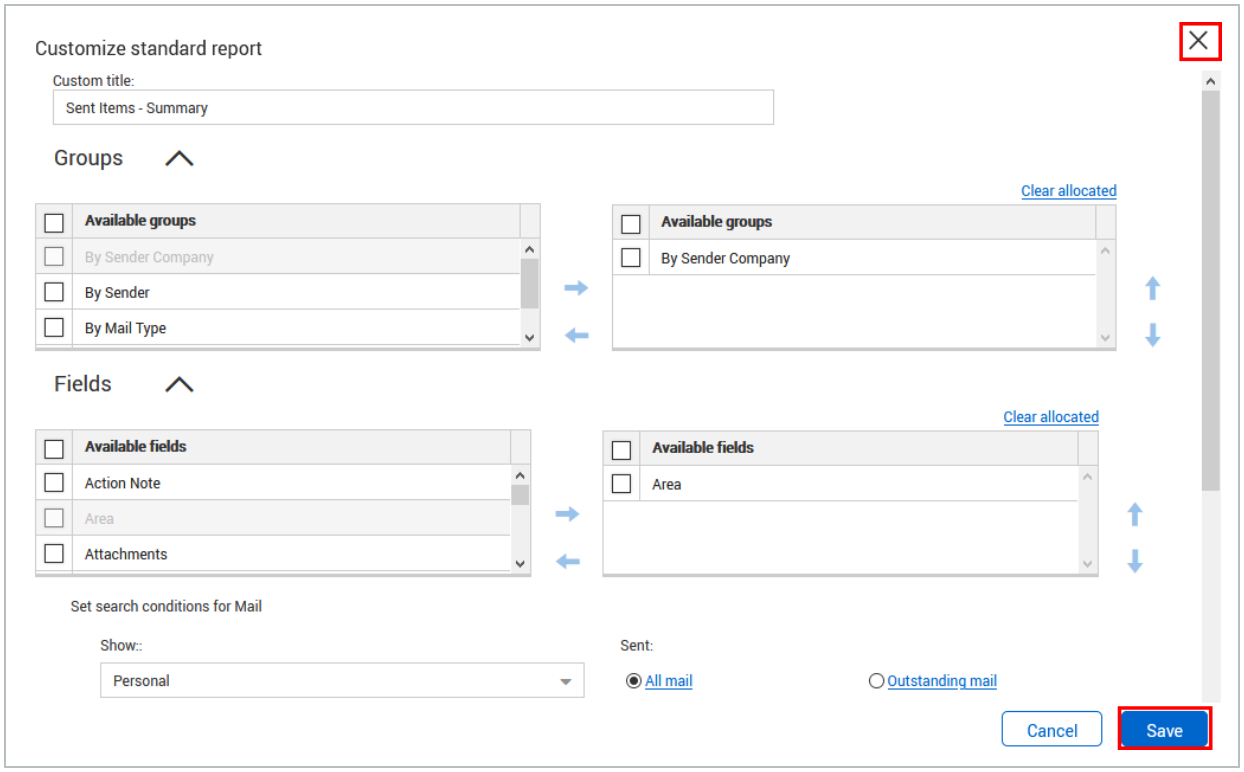
1. Select the standard report you wish to customize.
2. Click the **Modify** button. This opens a new window.




3. Enter a custom title for your report.



4. Define your customized report using the Groups and Fields options. For example, if generating a report on Documents you may want the report sorted by Discipline then status. In this case you would select Discipline from the “Groups” area and “Status” from the “Fields” area.
5. Once the required selections have been made, adjust the order in which they will appear in the report from left to right using the up and down arrows on the right.
6. Next, define the default search criteria for the report and click **Save** and then close the window..




7. Once created, Custom Reports are added to the standard reports listing with a report number allocated automatically. This is based on the standard report number plus an alpha suffix which commences from “a” for the first custom report created.

The reference number hyperlink is retained, so you can quickly open the link to view the item.

# CHAPTER 3 – MAIL REPORTS

When running any of the reports below, listed mail items are always subject to the security settings of the user running the report (both in term of mails types and whether (they have access to Company, Department, or Personal Mail).

| Report No. | Title | Description |
|---|---|---|
| 001 | Inbox - Summary | This report is based on a summary register of mail in the Inbox. Duplicate mail items will be excluded from the report if this setting has been applied to the user's Inbox prior to running the report. |
| 004 | Inbox - Details | A detailed register of incoming mail that includes the details of responses (linked mails) made to each mail by users within the same company as the logged in user. |
| 005 | Cross Company Mail Status Report | This report can only be used if the recipient of mail has the "Allow the sender to see the status of the mail in my inbox" option ticked in their user preferences. If this option is ticked then this report provides visibility into the status of recipients for the sender running the report. |
| 010 | Sent Items - Summary | This report is based on a summary register of mail in the Sent Items mailbox. |
| 015 | Sent Items - Details | This report shows mail in the Sent Items Mail box with options to include:<br>• The response received against each mail item.<br>• A list of people who have NOT responded (ie replied to or forwarded the mail) as requested for each mail item. |
| 020 | Mail Review Report - Summary | This report shows mail sent for review with details on when it was sent, reviewer(s),the review status, and any comments. |
| 025 | Mail Review Report - Details | This report is as per report 020 with some additional details provided for each mail item. |

| Report No. | Title | Description |
|---|---|---|
| 060 | Drafts – Summary | This report is based on a summary register of mail in the Drafts mailbox. |
| 065 | Drafts – Details | This report is as per report 060 with some additional details provided for each mail item. |
| | Deleted Mail Items – Summary | This report is based on a summary register of mail in the Deleted Items mailbox. |
| 085 | Deleted Mail Items - Details | This report is as per report 080 with some additional details provided for each mail item. |
| 090 | Unregistered Mail Items – Summary | This report displays details of all unregistered mail items and their processed status (one row per item) subject to the search criteria selected. |
| 120 | Mail Thread Report | This report displays any mail associated with a thread. Both the root mail of the thread and all the linked mails together with the status of each mail and the thread status are listed. |
| 130 | Latest Response Report | This report displays both the root mail of the thread and last reply mail of the thread. |
| 140 | Mandatory Recipients – Detail | This report displays the users assigned as Mandatory Recipients in the To and Cc fields. |
| G001 | Graphical Report | The Graphical Report option allows a variety of graphical based reports to be generate based on either the Inbox or Sent Items. For example, the number of mail items by type received on a periodic basis. |

# CHAPTER 4 – DOCUMENT REGISTER REPORTS

| Report No. | Title | Description |
|---|---|---|
| 001 | Details - by Document | This report is a simple register of all documents with options to include all revisions, only the latest revisions etc. This report is subject to the document access rules of the user running the report. |
| 015 | Summary Report - by Status and Revision | This is a powerful cross tabulation of the number of documents uploaded each period (e.g. Month) to InEight Document by Revision and Status.<br>On the Y access each Revision + Status combination is listed. On the X axis the number of documents uploaded at that Revision and Status combination for each period is detailed.<br>Search options provided when running this report include:<br>• Document Status<br>• Discipline<br>• Type<br>• Document No Contains<br>• Title Contains<br>• Date Range for the report. |
| 020 | Document Access Details – By Document | Lists user access (including formats) by document. |
| 025 | Document Access Details – By User | Lists document access (including formats) by user. |
| 060 | Discipline Matrix Unassigned Users | Lists by discipline, users who are NOT part of the default distribution matrix. |

| Report No. | Title | Description |
|---|---|---|
| 075 | Document Comments - by Document | Lists the text comments made against each document in the Document Register. |
| 080 | Deleted Documents - by Document | Lists all documents that have been deleted. |
| 090 | View Files - Download History | Allows users to generate a report of View Files downloaded from the InEight Document system across a date range. The report includes who downloaded each View File and the date downloaded. |
| 100 | Transferred Documents Report | This report lists all documents that have been processed into the current document via the Unregistered mail option Process Transmittal as Document. |
| 110 | Replace / Remove View Files History | Lists all View Files that have been replaced or removed from documents. |
| 120 | Document Linked - Items | Lists all documents that have links to other items including links, associated module(s) and reference number. |
| 250 | Document Register - by File name | Lists documents with an additional column for the file name. |
| G001 | Graphical Report | This report represents information as a histogram. |

# CHAPTER 5 – TRANSMITTAL REPORTS

When running any of the reports below, the visibility of Company vs Personal transmittals is subject to the security settings of the user running the report.

| Report No. | Title | Description |
|---|---|---|
| 001 | Details - By Transmittal No. | This is a simple register of Transmittals and associated documents . |
| 005 | Details - By Recipient (Contact) | This is as per Report 001 but sorted by Recipient. |
| 010 | Transmitted - by Document (Not Downloaded only) | Lists recipients of transmittals who have not downloaded the files associated with that transmittal. |
| 015 | Transmitted - by Recipient (Not Downloaded only) | This report lists by recipient, documents received by transmittal, but not downloaded. |
| 020 | Pending - by Document | Lists pending transmittals by Document, where recipients have received previous revisions of the document by Transmittal, but not the latest revision. |
| 025 | Pending - by Recipient (Contact) | For each Recipient lists pending Transmittals containing documents which they haven't received the latest revision of. |

| Report No. | Title | Description |
|---|---|---|
| 030 | Pending - by Company | For each Company, lists pending Transmittals containing documents where at least one user has received a previous but not the latest revision. |
| 035 | Recipient Document Register - by Document | Lists the recipients who have received access to each document (by transmittal only. The report shows the current revision and status of the document and the last revision and status sent to each recipient (which if different would be a pending transmittal). |
| 040 | Recipient Document Register - by Recipient (Contact) | This report effectively details for each recipient the documents they are on the distribution for (based on distribution by transmittal only) – i.e. the documents which recipients have been issued by transmittal. The report shows the current revision and status of each document and the last revision and status sent to each recipient (which if different would be a pending transmittal). |
| 045 | Recipient Document Register - by Company | This report is as per Report 040 but is generated for each company, regardless of which user in a company has been issued the documents by transmittal. If document was transmitted to several users in the same company, it will only be listed once for the company on this report. |
| 050 | Document Distribution Matrix | This is a cross tabulation report with documents on the Y axis (grouped by Discipline) and companies on the X axis and is used to detail which companies have access via transmittal to which documents. Access is indicated by showing the last revision sent against the document under each company that has access to the document. |
| 060 | Transmittal Review Report – Summary | This is a summary report displaying transmittals from the Drafts register for which the review is either pending or in progress. It shows the previous and current reviewer only. |
| 065 | Transmittal Review Report – Details | This report is as per report 060 but shows details regarding all reviewers (when there is more than one) of each Transmittal. |
| 100 | Inbox – | A simple register of Incoming Transmittals without details of the |

| Report No. | Title | Description |
|---|---|---|
| | Summary | documents on the transmittals. |
| 105 | Sent Items - Summary | A simple register of Sent Transmittals without details of the documents on the transmittals. Note that cancelled transmittals are excluded from this report by default. |
| 110 | Inbox – Details | A simple register of Incoming Transmittals with details of the documents on the transmittals. |
| 120 | Linked Transmittal Inbox Response Summary – By Transmittal | Lists incoming transmittals and the reference number of any outgoing transmittals manually linked as a response |
| 125 | Linked – Items | Lists and provides associated details for all outgoing transmittals that have links. |

# 5.1 FORM REPORTS

| Report No. | Title | Description |
|---|---|---|
| 001 | Summary | List of the forms created for the project along with a summary of their respective details. |
| 005 | Report - History | List of the forms created for the project along with a detailed history of the changes made to the forms. |
| 010 | Report - Review Details | Lists the forms that have been assigned for review. Details include:<br>• **Total days scheduled** – Review scheduled days, not the total review period for the form.<br>• **Total days to date** – Review actual days to date since the reviewer was notified to commence their review (for incomplete reviews), or the actual days taken for the review (for completed reviews). This applies to the reviewer themselves, not the entire review process.<br>• **Total days left** – Days left for completed reviews is zero; for |

| Report No. | Title | Description |
|---|---|---|
| | | reviews in progress, this is the scheduled completion date minus the system date.<br>The report also shows the scheduled and actual completion dates for each form regarding the review. When the workflow is activated, the scheduled date is empty for reviewers who have not yet been notified. |
| 015 | Report - Comments | Lists forms that have passed through a workflow or are currently in a workflow (even if not yet activated) and shows the text-based comments provided by each reviewer for every form. |

# CHAPTER 6 – DOCUMENT WORKFLOW REPORTS

Reviewers can generate reports only for documents they are assigned to review. Review coordinators can generate reports only for documents they coordinate. Administrators can generate reports for all documents included in a workflow.

| Report No. | Title | Description |
|---|---|---|
| 001 | Review Summary - by Discipline | Lists the documents that have passed through a workflow or are currently in a workflow (even if not yet activated) for each Document Discipline.<br>This includes:<br>**Total days scheduled** for review.<br>**Total days to-date** is either the actual days taken to complete the review (for completed reviews) or (for incomplete but activated reviews) the days the document has been in review so far.<br>**Total days left**, which for completed reviews = 0, and for reviews in progress is the scheduled completion date, less the system date in days.<br>The report also details the **scheduled** and **actual** completion dates for each review. The Scheduled completion date is based on the sum of the scheduled durations for each reviewer who has not yet completed the review (for serial reviews) or, the longest duration for any of the reviewers not yet finished (for parallel reviews). |
| 005 | Review Summary - by Document | As per Report 001 but sorted by Document Number rather than Discipline. |
| 010 | Review Details - by Reviewer | Lists the documents that have been allocated for review, by Reviewer, and includes completed, in- progress, and awaiting activation workflows.<br>Details include: |

| Report No. | Title | Description |
|---|---|---|
| | | **Total days scheduled for review** is the scheduled days for the reviewer, not the total review period for the document.<br>**Total days to date** which is either the actual days to date since the reviewer was notified to commence their review (for incomplete reviews), or the actual days taken for the review (for completed reviews). This is for the reviewer themselves and not for the review process in total.<br>**Total Days left**, which for completed reviews equals 0, and for reviews in progress is the scheduled completion date, less the system date in days.<br>The report also details the scheduled and actual completion dates for each document regarding the review. When the workflow is activated, the schedule date is empty for reviewers who have not yet been notified. |
| 015 | Review Details - by Document | As per report 010 but sorted by document. For each document, it lists the details of each reviewer as per Report 010 and is ideal for analyzing the status of a workflow for a document and when each reviewer completed their review (or not as the case may be). |
| 020 | Reviewer Comments - By Document | Lists documents that have passed through a workflow or are currently in a workflow (even if not yet activated) and for each document details the text-based comments made by each reviewer. |
| 025 | Review/Release Summary – By Document | Lists the release status of each document that is either in or has passed through the workflow process. For each document the Review Coordinator is listed with the following information:<br>**Total Days Scheduled** for the release process (between completion of the review by all reviewers and the release).<br>**Total Days To-date** which is either the actual days to date since the review coordinator was notified that the reviewers had completed their reviews (for documents not released), or the actual days taken for the release process (for released documents).<br>**Total Days left** which for released documents = 0, and for |

| Report No. | Title | Description |
|---|---|---|
| | | documents in the process of being released is the scheduled the completion date less the system date in days.<br>The report also details the **Scheduled** and **Actual** Completion dates for each document regarding the release.<br>Finally, the Status is listed.<br>When running this, a number of useful filter options are available such as running the report only for documents where the release is due in the next X days. |
| 030 | Review/Release Summary - By Review Coordinator and Document | This report is similar to report 025 except that the report is sorted by Review Coordinator and then Documents (so that all documents relating to a Review Coordinator are grouped together) rather than just by Document Number. |

To generate a report listing the Review Teams, use Report 100 – Document Rules – Review Teams which can be found under the Administration group of reports.

*This page intentionally left blank.*

# CHAPTER 7 – PACKAGE REPORTS

| Report No. | Title | Description |
|---|---|---|
| 001 | Tender Documents - Released and Downloaded Only | Lists documents released for tender and for each document details the Recipient, the documents they have downloaded, and the date downloaded. |
| 005 | Packages – Sent Summary Report | Lists all packages that have been issued. Choose between Tender Package, Standard Packages or both. |
| 010 | Packages – Sent Detailed Report | Lists all packages that have been issued and includes recipient details. Choose between Tender Package, Standard Packages or both. |
| 015 | Standard Documents – Issued and Downloaded Only | Lists all Standard Packages that have been issued. |
| 020 | Package Award Details – By Package | Lists details of all tender packages that have been awarded. |
| 030 | Inbox Summary Report | Lists all packages that have been received by your company. |
| 035 | Inbox Detailed Report | Lists all packages that have been received by your company and lists the documents included in each package. |
| 040 | Tender Acknowledgement Detailed Report | Lists the acknowledgement status for each recipient of tender package invitations or addendum notifications. |
| 045 | Linked Items | Lists Packages that have related links with the details of the links listed. |

*This page intentionally left blank.*

# CHAPTER 8 – TASKS REPORTS

| Report No. | Title | Description |
|---|---|---|
| 005 | Summary Report on Tasks Assigned to me | Displays a summary list of all Tasks that have been assigned to the logged in user. |
| 010 | Summary Report on Tasks created by me | Displays a summary list of all Tasks that have been created by the logged in user. |

*This page intentionally left blank.*

# CHAPTER 9 – ADMINISTRATION REPORTS

Some reports are only available to administrators or those with delegated administration access (for nominated roles such as Review Coordinators).

| Report No. | Title | Description |
|---|---|---|
| **Report Group: Address Book** | | |
| 001 | Details - by Company ID & Contact ID | A simple address list report of all contacts (with Contact ID in brackets) in the address book sorted by Company and User. |
| 005 | Details - by Company ID & Last Name | Similar to Report 001 but sorted by Company and Last Name of the contact. |
| 010 | Details - by Contact ID | Similar to Report 001 but sorted by Contact ID. |
| 015 | Details - by Last Name | Similar to Report 001 but sorted by Last Name of the contact. |
| 020 | Details - by Company Type | Similar to Report 001 but sorted by Company Type. |
| 025 | Details – by User Type | This is a useful report to print User Details with filter options for:<br>• External contacts<br>• Restricted Users<br>• Users Allocated to Security Groups<br>• Users who are not external contacts and are not yet allocated to a security group |
| 030 | Details - by Active Users | Similar to Report 001 but includes only Active Users. |

| Report No. | Title | Description |
|---|---|---|
| 100 | Contact Groups | A report on the contacts belonging to each contact group. |
| **Report Group: Administration** | | |
| 015 | Notifications History – by Notification Type | Enables Administrators to generate a report on all email notifications that have been sent from the system. This provides a full historical archive of who was notified about what, and when. The report details are grouped by Notification Type.<br><br>A simple filter is provided when running this report to enable the user to easily select from:<br>• Notification Type<br>• Date Range for Date Sent<br>• From Company/Contact<br>• To Company/Contact. |
| 020 | Session History Details | An audit report on selected user sessions within a defined date range, including how a user has signed into Document and whether it is through XL Upload, the web interface, or the mobile app. |
| 025 | BIC Report | The “Ball in Court” report lists all outstanding actions by User including:<br>• Document Reviews (workflow module)<br>• Document Release (workflow module)<br>• Document Activation (workflow module)<br>• Mail Review<br>• Mail Reply<br>• Transmittal Review<br>• Packages to Release.<br>Overdue items are highlighted in red. |
| 100 | Document Rules – Review Teams | A report on details of the Review Teams defined in the workflow module. |
| 105 | Logon Disclaimer Report | A report detailing which users agreed and which users did not agree to the disclaimer message shown at first logon. |

| Report No. | Title | Description |
|---|---|---|
| 110 | Free Form Review Teams | A report listing the details of each Free Form Review Team defined for use with the workflow module. |
| 210 | User (List all Access) | A report listing the security group and access to InEight Document modules for each user. The report has the option to include a complete history of changes to each user's security settings with historical settings highlighted in grey. |
| 220 | User Active/Inactive History | An audit trail of all actions relating to the creation and updating of InEight Document users. The active column indicates whether the user is Active (yes) or Inactive (No). |
| 230 | Security Group Details | For each security group, lists the access settings for each mail type. The report has the option to include a complete history of changes to each security group settings with historical settings highlighted in grey. |
| 240 | TeamBinder Administrators Details | Lists the details of all Administrators on a particular project. |
| 250 | Distribution Rules | Allows you to quickly review the document distribution rules for your team. |
| 280 | Document Download Activity Report - by User | Shows document download volumes per person over a set number to help you identify suspicious activity. |
| 290 | Failed login report | Shows failed sign in attempts made on a project. |

# 9.1 SUBMITTAL REPORTS

| Report No. | Title | Description |
|---|---|---|
| 001 | Details - by Submittal number | A list of the submittals created for the project along with a summary of their respective details, including the Description, Alt reference number and Schedule activity ID fields. |

| Report No. | Title | Description |
|---|---|---|
| 005 | Details - by Deliverable number | A list of submittals in the project sorted by delivery number, including the Description, Alt reference number and Schedule activity ID fields. |
| 010 | Details - by Set number | A list of submittals in the project sorted by set number. |
| 015 | Submittal - Placeholder Documents | A list of submittals with placeholder documents. |
| 020 | Submittal Report - Review Details | Lists the submittals that have been assigned for review. |