## **QUICK GUIDE**

# **REPORTS ESSENTIALS**



#### ACCESSING REPORTS

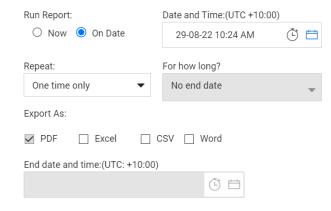
1. Click Document / Dashboard ✓ ▶ Reports

#### RUNNING REPORTS

- 1. In the left hand panel, select the required report
- 2. Enter/select the search conditions
- 3. Click Search

#### SCHEDULING REPORTS

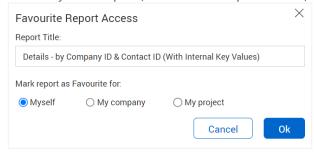
- 1. Select the report you want to schedule
- In the Report details under Run Report, select On Date
- 3. Select the following filters:



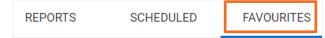
- 4. Click the **Search** button to schedule the report
- 5. To see a list of schedule reports (and/or modify any of them), use the **Scheduled** tab

### ADDING FAVOURITE REPORTS

- 1. Select the report you want to add
- 2. Click the Add to favourites button
- 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.



#### Note:

- 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.

#### CREATING OFFLINE REPORTS

- Offline Reports can be created, for large and complex reports that take more than a few minutes to generate.
- Once the report has been generated, the user is notified by email with a link to download the completed report.

Contact InEight if this is of interest as this feature can only be activated by InEight.

### GENERATING HYPERLINKS

- 1. Search your selected report
- 2. Select the Generate Hyperlink button
- 3. Select Copy link ► Close



### EXPORTING REPORTS

1. Select the Excel PDF Word