

## 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
2. In the Report details under Run Report, select **On Date**
3. Select the following filters:

Run Report: Date and Time:(UTC +10:00)

Now  On Date 29-08-22 10:24 AM

Repeat: For how long?

One time only No end date

Export As:

PDF  Excel  CSV  Word

End date and time:(UTC: +10:00)

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)

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Favourite Report Access

Report Title:

Details - by Company ID & Contact ID (With Internal Key Values)

Mark report as Favourite for:

Myself  My company  My project

4. Click on the **Favorites** tab to access reports marked as Favorites.

REPORTS
SCHEDULED
FAVOURITES

**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**

✕

Generate Hyperlink for current report

Report No: 02.020

https://au1.doc.ineight.com/TeamBinder5/Integration/tbOpenItem.aspx?ReportNo=02.020&ProjNo=TRAINING504&Filter=(B51E4DCB-812A-4AD6-87E2-F2A914010E9A)&Target=report

[Copy link](#)

## EXPORTING REPORTS

1. Select the  button

Excel

PDF

Word