INEIGHT

REPORT USER GUIDE

REPORT

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CONTENTS

STEP-BY-STEP PROCEDURES

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CHAPTER 1 – INEIGHT REPORT OVERVIEW

1.1 REPORT OVERVIEW

There are many preconfigured operational and performance related reports that you can choose from. After you select a report, you can then change parameters to refine the report to meet your specific needs.

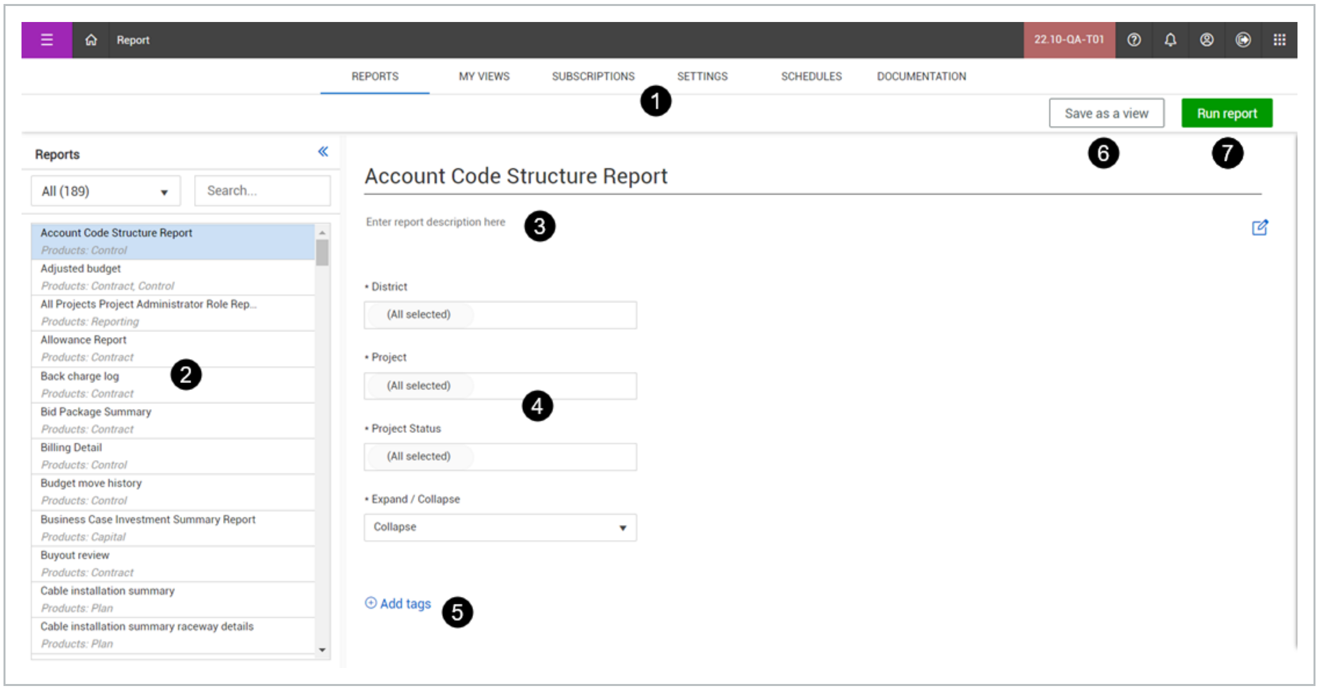
- Operational reports help you confirm that accurate data has been collected, which further ensures that quality data is captured for assessing project performance on your dashboards. Rather than always creating tabular reports, you can find information and react quicker when operational data is presented as exceptions.

- Performance reporting allows stakeholders to monitor key performance indicators (KPIs), which measure the overall health of the organization in terms of finance, productivity, and risk. The data appears in non-real time. Performance reporting requires data to be captured at a point in time that gives you accurate and relevant information for making decisions.

InEight Report pulls information from the different InEight applications. Reports can be saved to PDF, Excel, CSV file format, or can be printed.

You can open the Report application from anywhere in the InEight cloud platform, whether you are in a project or organization. From the landing page, click the **Main menu** icon, and then click **Report** or you can open it from the Organization home or Project home pages using the left navigation menu.

The window opens to the Reports tab.



Overview - Reports Page

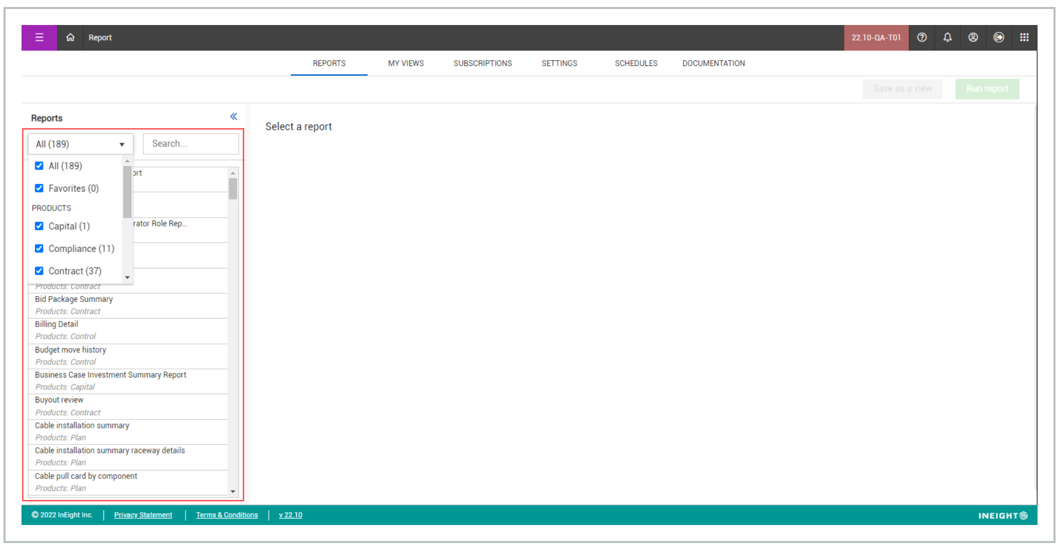
	Title	Description
1	Tabs	Provides navigate between the different pages and features in Report.
2	Reports	List of all available reports shown in alphabetical order and includes the InEight product associated with the report.
3	Description	Optional text field that can be used by Report administrators to provide information about the report. Only Report administrators can add and change a report description.
4	Parameters	Values selected in the report for the organization or project that define the data and filtering shown in the report. Parameters and parameter values vary depending on the report selected.
5	Add tags	Lets you add tags to the report to quickly identify or group certain reports that have the same tag associated with it.

Overview - Reports Page (continued)

	Title	Description
6	Save as a view	Saves the current parameters in the report, so it can be run again at another time.
7	Run report	Creates the selected report.

From the Reports tab, you can access all reports and scroll through the report titles, sort by product, or use the Search option to find a specific report.

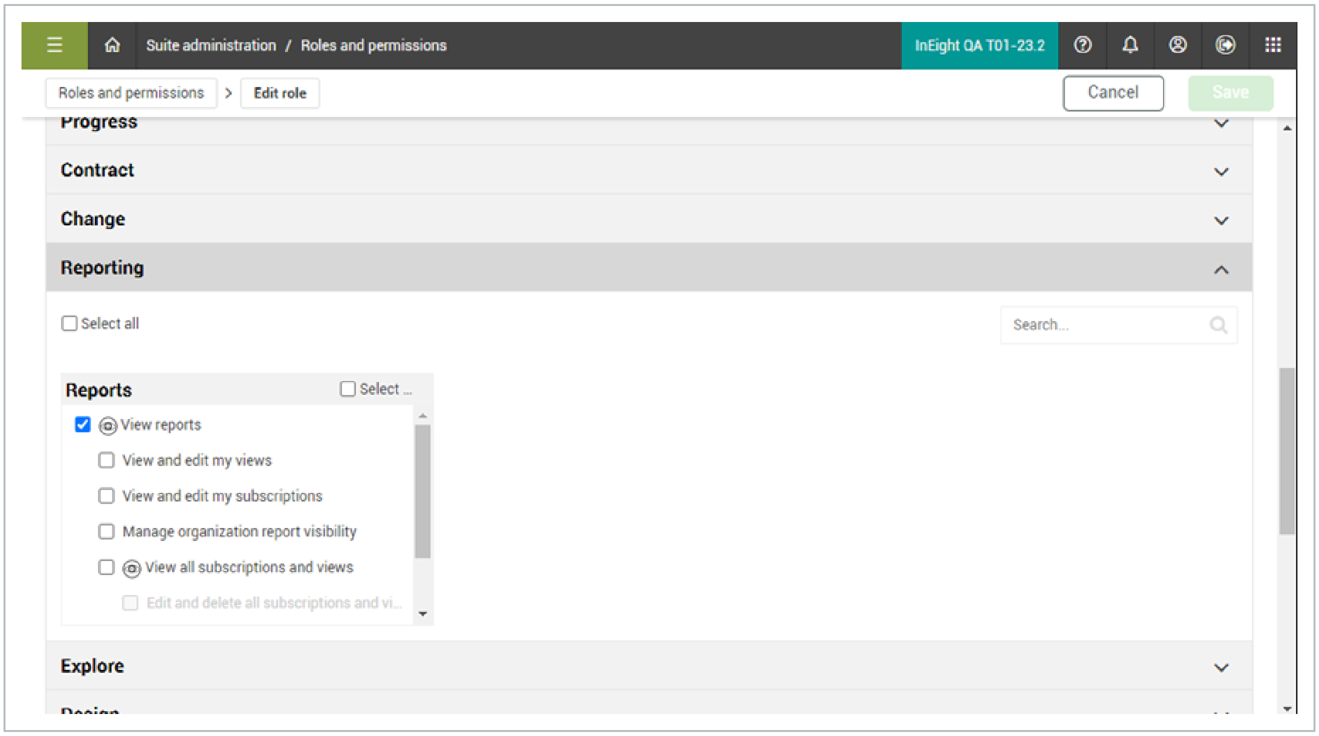
> The data that shows in reports are based on the organization and projects that you have allowed to access.



1.2 REPORT PERMISSIONS

To access reports, you must be assigned a role with applicable permissions, which are defined by a system administrator. Reports are pre-assigned to roles that are based on functional areas, such as project management, construction management, field office, operations, finance, compliance, and administration that let you run reports tagged with the same permission assigned to one of the roles. For more details, refer to Roles and Permissions in InEight Platform.

Configured in Suite Administration > Roles and permissions > Permissions > **Reporting**, these permissions control access to reports.



Permission Name	Description	Level
View reports	The parent for all other reporting permissions. This permission lets you view and run reports in the report list. Access to data in reports is restricted to the assigned projects in InEight Platform. This permission allows you to also access these pages: Report > Settings > Time Zone and Report > Settings > Tags (only applied at the individual user level), and Report > Documentation.	Base user
View and edit my views	Allows you access to the Views page and lets you create, edit (including changing owner), and delete the views you own. This permission enables the Save as View button on the Reports page.	Base user
View and edit my subscriptions	Allows you access to the Subscriptions page and lets you create, edit (including changing owner), and delete the subscriptions you own.	Base user
Manage Organization report visibility	Allows you access to the Report > Settings > Report visibility page and all of its functionality. This page allows you to control the reports that are shown and hidden for the whole organization.	Org Admin

Permission Name	Description	Level
View all subscriptions and views	Allows you to see all subscriptions and views created in the organization on the Views and Subscriptions pages. This only includes your own subscriptions and views if you do not have the permissions View and edit my views and View and edit my subscriptions.	Org Admin
Edit and delete all subscriptions and Views	Allows you to edit or delete all subscriptions or views in the organization. This permission allows you to change the owner of a view or subscription.	Org Admin
Add and edit report descriptions	Allows you to add and edit the description of the report on the Reports page. The description shows below the report title of the parameter section when a report is selected.	Org Admin
Ability to import schedule information	Allows you to view the Report > Schedules tab and import new schedule data.	Project Admin
View integration reports	Allows you to access reports through other InEight applications (i.e., Contract, Change, Compliance, etc.) and hides Report and the report list	Base user

1.3 TYPES OF REPORTS

Each report has associated permissions and are categorized by functional areas that are linked to those permissions. The reports list shown is a sampling of the many available reports that you would be able to access depending on your assigned role and associated permissions.

Report	Description
Allowance Report	This report for InEight Change gives insight into total allowance by allowance category that is based on the current value of an issue.
Buyout review	The Buyout review report provides a listing of bid packages by discipline, vendor, and account code to help you to quickly analyze what contracts still have contingency escalation and

Report	Description
	unawarded scope remaining. It will calculate base budget and G/L and provide forecast calculations based upon any potential and current change orders and the status of the buyout associated with those contracts. The report displays bid package information grouped by bid package type along with original values, potential changes and forecast amounts. Utilizing this report will help you to stay on time with presenting contracts to vendors in-order to keep material costs and staff on budget and on time.
Change order summary	Printable list of change orders by status and change type (e.g. budget move, contract adjustment, etc.). Shows total budget $ adjustment, budget Mh adjustment, and contract $ adjustment.
Commodity curves	The Commodity curves report presents a condensed view of commodity quantities planned, claimed and forecasted over a time period, with current and baseline schedule. For each project, and for each commodity, a weekly forecast schedule is pre-defined and loaded. The line graph displays the cumulative quantities over the time period. Construction complete, Quality complete and Turnover complete lines are plotted based on the completion of claiming scheme steps with respective rule types, whereas baseline and current line curves are plotted based on the chosen baseline budget and forecast schedule percentage. The column chart displays planned and claimed quantities for each week. By comparing actual quantities with scheduled quantities, you will be able to track whether the project is ahead or behind the schedule.
Construction progress summary	This report provides you with a report of the hours used by discipline for a selected project for a selected period, and to date. It provides, planned, actual and earned information as well as performance factor information for comparison. This report is used to monitor the health of the project and provide a quick snapshot of the progress of a project and the performance factor by discipline for the period selected, to date and over the past five weeks.
Crew communicator	Shows the daily plan. Includes tasks, employees, equipment, quantities, and hours. Also, shows Safety/Quality/Environmental concerns and notes.

Report	Description
Crew communicator summary	Shows upcoming plans with cost vs. budget information (quantities, hours, and dollars), including the planned gain or loss.
Crew performance	Shows actual cost vs. budget (quantities, hours, and costs) performance by crew for the prior day (with the ability to select a range of dates).
Daily cost performance	Measures actual, earned, and gain/loss of man hours by task (WBS); typically used to monitor daily performance, but any date range up to the prior day may be selected.
Daily plan review	A ready-made, consumable report shows a detailed view of what happened on the job site that you can present to clients and owners.
Delivery status	The Delivery status report presents a snapshot of all deliverables that are being supplied by vendors across all contracts within a project. The report shows the current delivery schedule for deliverables (goods & supplies) and submittals (drawings & specifications). Liquidated damages (LD), which is compensation for late delivery, may be defined for each deliverable and submittals per day not to exceed a set percent of total contract value or a set amount. Additionally, the report calculates the contractual days late for delivery, accrued liquidated damages, and displays back charges associated with the deliverable. Utilizing the information provided by the report, you can proactively act on deliverables that could be delivered late by vendors and can assess impact and damages caused by the late delivery.
Earned values	This report is utilizes data from Control, and data is imported manually. The Earned Value report sources data from Control as well as data entered into the new data import tool. The earned value report will track Actuals, Baseline, Forecasted, Current Budget, and Current Estimate cost and Man Hours over time.
Employee hours	This report is designed to provide end users, (Approver 1, Approver 2, Executer, Business Manager, Contract Admin, Project Management, District Legal and Compliance Managers, Payroll,

Report	Description
	etc.) the ability to view the current status and history of any employee project hours. This is a Time usage report that shows a record of hours planned and usage toward the project selected. To produce documentation as a historical record of time entry that happened on a project, broken down by daily plan Planned, Approved and Actual hours.
Equipment hours (for ERP)	This report allows you to see the equipment hours by piece and the reason codes of the equipment. This report is used primarily to help in the integration of equipment with an ERP system.
Forecast health	This report provides warnings about your cost items related to forecast, actuals, productivity, and account code assignments. This report also considers the project settings for calculating percent complete.
InEight Compliance All Tasks	Similar to the InEight Compliance General Forms report. However, this report allows you to see information at the task level. This report allows you to select a specific task or many tasks, and then filter the results by date, status, title, ID, and state.
Installed quantity	Shows the quantities claimed per claiming step of a component and task, and provides a final post-conversion installed quantity. This is done by taking the quantity of each claiming step against a pre-determined weighing percentage to determine an installed quantity. These are then summed up to the component level to show component install quantity, then all component quantities are summed to show the task's installed quantity.
Issue log - client summary	The Issue log client summary provides a breakdown of the Issue ID and PCO ID when it has been created. It gives you the ability to identify the issue status and the current owner or "ball in court" status and client notification dates and dates of transactions. The report provides you the ability to track the issue status, client communication, pricing status, dates communicated with client, and displays the most recent note associated with the issue.
Issue log - issue summary	The Issue log issue summary give you the ability to review and identify active issues that are still in process, what the current status is and next steps. It provides you an issue description, issue

Report	Description
	start date, number of days aged, who submitted the issue and who the field contact. It provides details on if the schedule is impacted, if it has been communicated with the client, and work plan, WBS details, as well as any pricing status, value type, current value, proposal status and recent notes.
Issue log - pricing	The Issue log pricing report provides the pricing details for an issue, the current status of the pricing details, and vendor information allowing you to quickly identify the current status of an issues pricing changes or modifications. A bevy of filters allow you to select individual issues or the ability to group issues and pricing statuses. Not all filters are required, allowing you to generate an output including all issues for a particular Project.
Issues by Vendor	The items shown in this report for InEight Contract include contract, vendor change order, vendor notes, PCO and CCO information by vendor, allowance category, and primary detail on issues.
IWP planning forecast	Shows cumulative curves, weekly or monthly bars of IWPs your project has planned, and what gets passed to the field. The report can be used to help you understand your planning capacity.
Man hour curves	The Man hour curve report displays an aggregated column and line graph of selected discipline groups and directs within a specified time period for a single project. For each discipline group - which is a logical grouping of disciplines, a baseline and current forecast schedule of man hours is pre-defined and loaded for the duration of the project on a weekly basis. Directs are account codes for which the cost incurred can be attributed directly. The column chart displays planned, earned and actual/forecast man hours for that particular week. The line chart displays cumulative man hours spent up to that week. Other reference curves are plotted based on the selection of Original Budget (OB), Current Budget (CB), and Current Estimate (CE). The curves help to compare man hours spent with forecasted man hours for week-on-week and for the total project duration. Timely intervention can be made based on the information derived from the curves.

Report	Description
Package progress	This report evaluates the progress of your work packages or turnover packages. It uses a color scale to indicate the claiming progress per package and also allows you to show and group the time frame by year, quarter, month, week or day.
Plan history	For each plan, the Plan history report shows hours by employee and equipment as well quantities by WBS over your selected date range.
Plan status	Provides a complete list of all plans for a selected project for a selected date range and their related status for a given day. It provides details and dates for status changes, information about the approvers. The sub-report provides you with the employee hours for the provided plans. This allows approvers and project managers the ability to quickly monitor the status of plans for approval and review employee hours for a given plan.
Project cost summary	Gives project managers a way to assess the project health by comparing budget, actual, and forecast (costs and hours) for a date range as well as job to date. The report is summarized one row per cost item for a selected project.
Project productivity	Compares actual units per hour vs. estimated units per hour so that project managers can assess labor performance. The report shows one line per cost item for a selected project.
Procurement status	The Procurement status report tracks the status and vital dates of bid packages within a project. Each bid package, which is a scope of work, goes through a list of milestones before it is delivered by the vendor. A project may utilize all or a subset of milestones defined for an organization. The report displays bid package information grouped by bid package type along with original start date, forecast start date, and completion date of each milestone. By looking at the dates, the contract administrator can ascertain when a bid package is needed and where exactly it is in the process of delivery so that a corrective action can be taken to ensure timely delivery, if necessary.
Procurement status look ahead	The Procurement status look ahead report depicts the next phase (milestone) the selected bid packages are going through within a

Report	Description
	project. It provides a detail of a bid package, grouped by milestones and bid package types, and a glance of days in future when original/forecasted start date will begin. Float shows the number of days between needed by date and forecast start date. Negative forecast start days remaining signifies a delay in start and negative float signifies the delivery of the bid package is past due. Both could potentially impact the project schedule. It is crucial to understand the root cause of the delays and to take corrective action to mitigate issues affecting the bid package delivery.
Quantity detail by work plan	The Quantity details by work plan report provides a summarized view of overall health of work plans along with the associated work plan structure items. The aggregated data provides total quantities and the percentage of work complete for each line item.
Subscription status by users	Allows organizations to audit the InEight cloud platform for inactive users who still have active subscriptions being sent to them. With required permissions, after identifying an inactive owner, you can change the owner to yourself and update or delete the subscription as needed.
Time phased cost curves	Using InEight Control's time phased forecasting capabilities, this report lets you see time phased cost curves for actuals and budget.
Vendor change order log	The Vendor change order log report aggregates all change orders submitted and executed by a vendor across all contracts within a project. The report provides details on the scope of change order, current status and associated costs for executing the change order. It also lists out the change order effective date, expiration date, reference number to engineering/material change, affected WBS phase codes, and the actual change order number between the joint venture and the client. The report helps in communicating with clients about potential changes and analyzing costs related to changes that ultimately affect gain/loss of an organization.
Weekly progress	This report utilizes imported schedule data and shows what your

Report	Description
	next week will look like in terms of earned and actuals from Control.
Work plan package	The Work plan/package report allows you as an authorized user, to view the details of a work plan/package on a spreadsheet. The objective of the report is to facilitate exporting all work plan/package data to a spreadsheet so that you can make further manipulations to the data, such as sorting, filtering, analyzing, creating pivot tables, etc. The same document can then be used in managing and communicating with crews.

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CHAPTER 2 – REPORT NAVIGATION AND SETUP

2.1 REPORT SETUP

This section covers the initial setup required for creating reports.

2.1.1 Parameters

Report parameters that are used for data selection and filtering are built into the application. If you are in a project and open the Reports page, the value in the Project field parameter by default is populated with that project. You have the option to change the Project field value and select another project from the drop-down list. If a project has not been selected, you can select one from drop-down list.

When you select a report from the Reports list, fields with parameters specific to the project are shown populated with the default values. Available parameters and the parameter values change depending on the report selected.

2.1.1.1 Cascading parameters

Cascading parameters are a series of dependent selections where the options in one parameter are influenced by the selections you made in previous parameters. The cascading parameters used in Report help you create dynamic, tailored reports.

When you are selecting parameters for a report, it is important to move through the parameters from left to right and top to bottom. As you make your choices, each parameter that follows the available options become more specific based on what you have already selected. Your selections cascade to make the subsequent choices more relevant and tailored to your initial decisions.

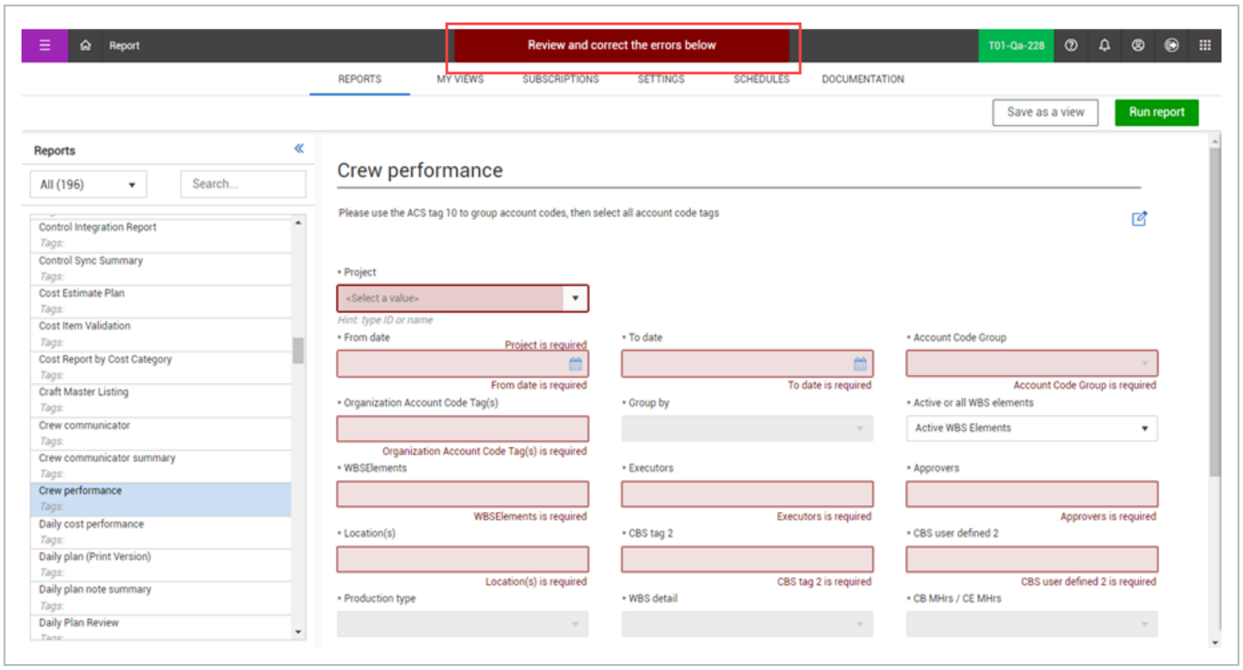
2.1.2 Run a Report

The following procedure goes through the basic steps to select a report to run, define report parameters, and run the report.

Run a Report

1. On the Reports tab, select a report from the Reports list. The report title and parameters show. An optional description of the report might also be provided.

2. Select a project if one is not already selected, and then complete the remaining parameters starting from left to right and top to bottom.
   - If the field allows multiple parameter, you can select the individual values or click **Select all** to include all values in the report.
   - After all the applicable and required parameters are completed, you can save the report as a view.
3. Click **Run Report**.
   - If there are any missing or incorrect parameters, the field shows as a red box and an error message is briefly shown at the top of the page. Fix the parameter issues, and then click **Run report** again.

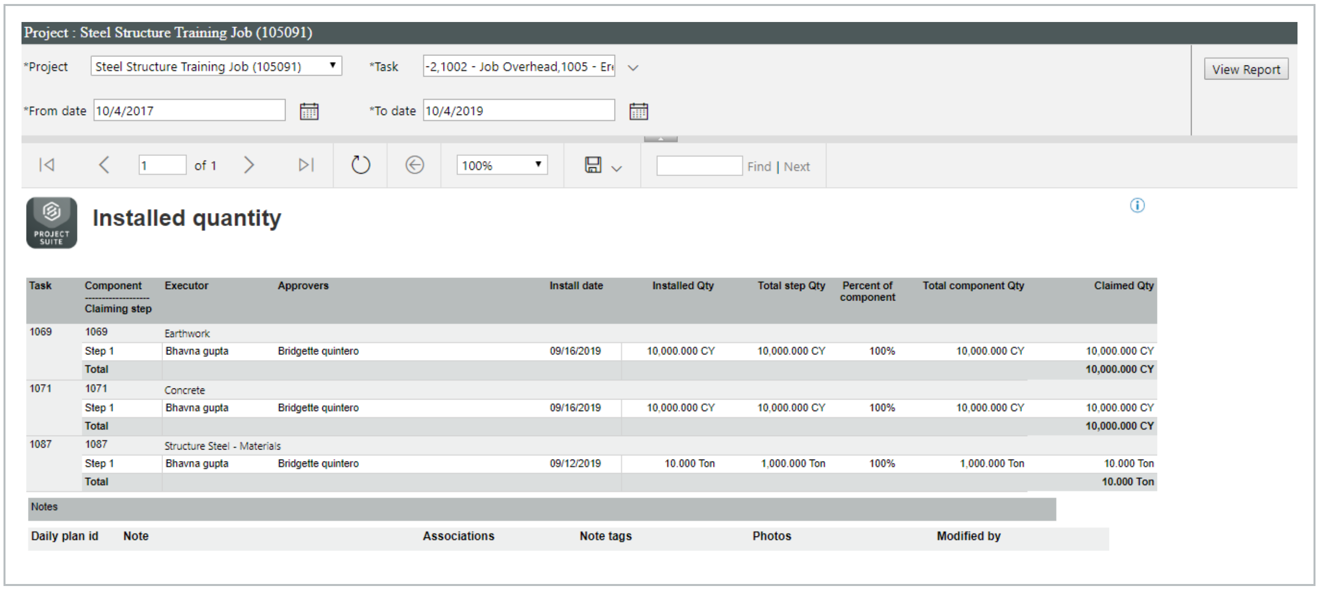


4. After the report runs, it will open in a new window.

> Make sure to allow pop-ups in your web browser or the report output could be blocked by your web browser.

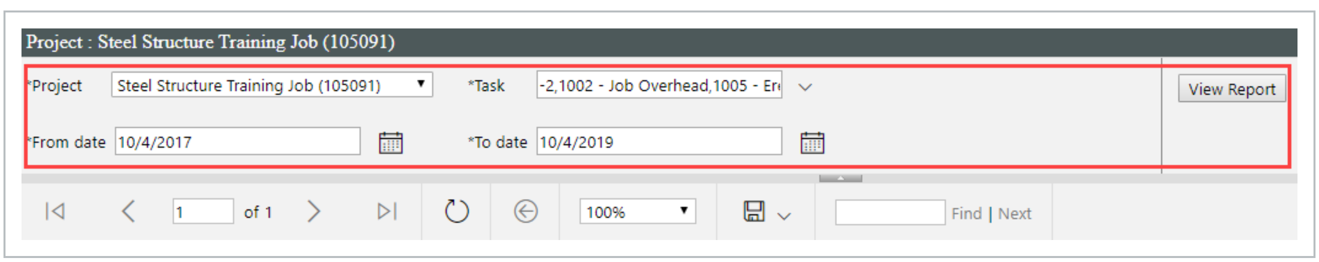
2.2 REPORT EXECUTION TAB

After the initial execution, a new tab opens and shows the SSRS report. All reports have some common functionality that lets you perform certain actions on the executed report. The report opens in a new window so you can go back to the original report parameters. Every report that you run will open in a new tab, which gives you the flexibility to go back to the original settings and run additional reports without affecting any report that has already been run.



2.2.1 Parameters

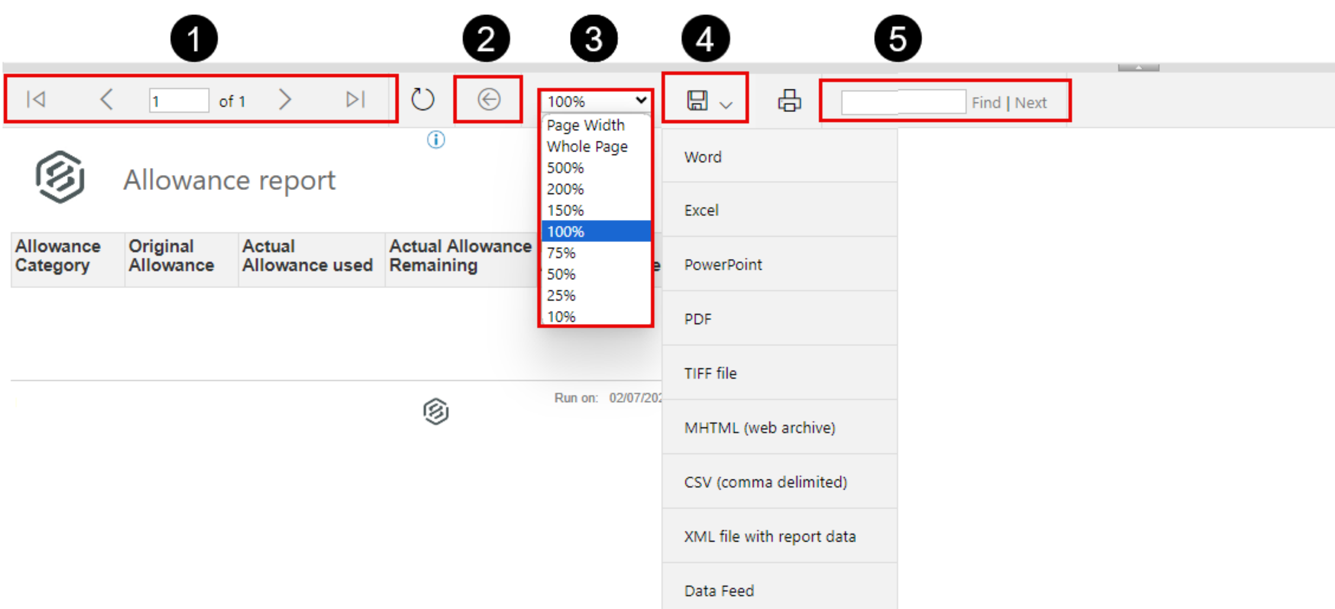
The parameters are used to select the data and filters that show in the report. After a report is run, you can change the parameters and run the report again with the different parameters. Click **View Report** to refresh the screen with the new data.



2.2.2 Report Page Control

Executed reports can generate multiple pages and the page controls help you navigate through your report. These standard controls show above the executed report under the documentation tab. Hover over an icon to view its function.

	Definition
1	First page, previous page, next page and last page. If there is more than one page in the report document, the additional icons become active.
2	Go back to parent report.
3	Page zoom, select from pre-defined widths.
4	Export drop down menu.
5	Find text in report.



2.3 MY VIEWS TAB

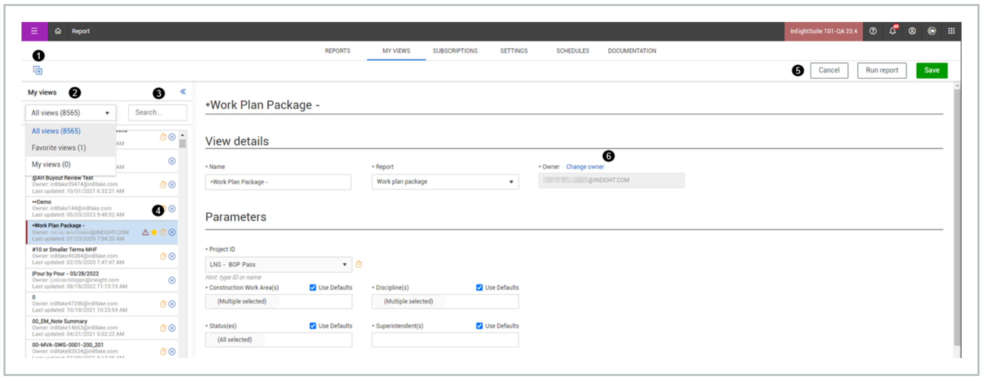
When a report with specific parameters needs to be repeated frequently, you can save it as a view. This allows a report and the specified parameters to be saved for future use.

The My Views tab shows all the saved views you have created, where you can run a report from a saved view, make the report a favorite, rename the view, delete or edit the report views, and more.

> The Reporting permission, View all subscriptions, provides additional access that lets you see, modify, and copy the view of other users.

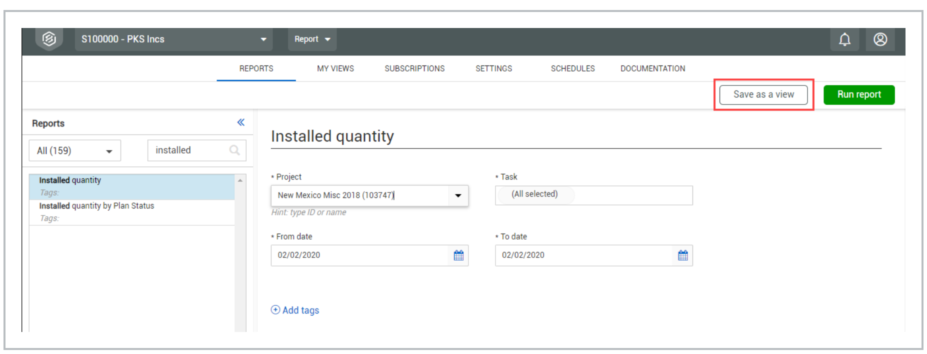
	Title	Description
1	Duplicate view	Click the button to make a copy of the selected view. If you have the View all subscriptions permission, you can copy views of other users.
	Send to File Storage	Click the button to
	Run report	Click the button to run a report with the saved view parameters.
2	Sort	Select a filter (All views, Favorite views, My views) to show the list of available views. To access All views, you must have the permission View all subscriptions.
3	Search	Type in the search box to find a specific view or views.
4	Invalid view	Indicates when view parameters need to be corrected. Click **Save** to show the fields with invalid parameters indicated in red.
	Add to favorites	Click the icon to save as a favorite view. Click the icon again to remove the view from your favorites list.
	Expired view	Indicates when a project or projects saved in the view has passed its end date.
	Remove view	Click the icon to delete the view from your saved views list.
5	Cancel	If you change the parameters of a saved view, click **Cancel** to discard the changes and keep the previous parameters.
	Run report	Click **Run report** to run a report with the saved view parameters.
	Save	If you change parameters of a saved view, click **Save** to keep the changes.
6	Owner	Shows the email for the owner of the view. You can change the owner of your views.

	Title	Description
	Change Owner	Click **Change owner** to open a dialog box where you can enter the email of the new owner. The new owner must be a registered user in the InEight application for that view. If you have the View all subscriptions permission, you can change the views of other users.

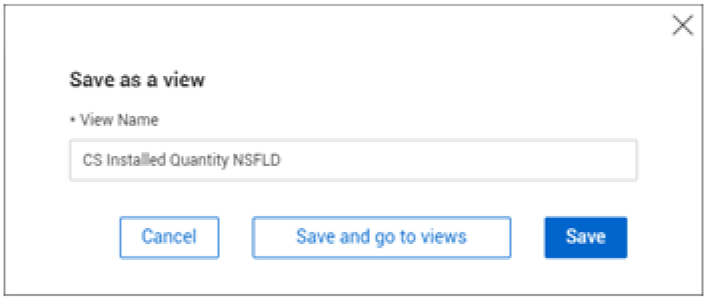


Save as a view

1. From the Reports tab, open the report that you want to access.
2. Select the report parameters you want to apply, and then click **Save as a view**.



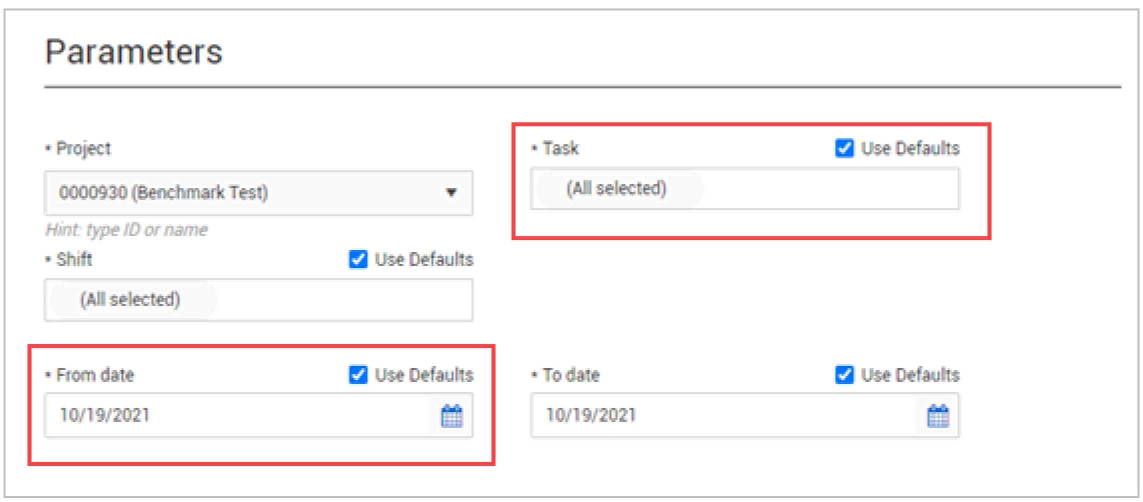
3. A dialog box opens for you to name the view. Enter a name, and then click **Save**.
   - You can click **Save and go to views** to save the view and open it on the My Views tab.



The saved view shows in the list on the My Views tab.

Modify a view

1. On the My Views tab, select a view from the list.
2. You can edit the parameters for a view.



The Use Default check box serves multiple purposes:

- When selected for a date parameter, it indicates that you want the dates to roll forward over time as your subscription runs. Otherwise, the view is saved with only the dates selected when the view is created.
- When selected for a parameter with a value of *All Selected*, it includes all the items in the list at the time the view is saved and any new items that are added to parameter in the future.

3. You can edit the preferences for a view. Preferences can include number format, date format, language, and date offsets.
   - If date offset shows in Preferences, you can edit the interval for running the report and it is applied to any subscriptions assigned in the view.
4. If you have the permission View all subscriptions, you will see the View details and Subscriptions sections.
   - The Views details section lets you change the owner of your views and the views of other users.
   - The Subscriptions section shows the name, description, and status of all subscriptions assigned in the view. You can select a subscription from the list and delete it or click the **Edit** icon to open the Edit subscription slide out-panel and make changes.
5. After you edit a view, click **Save** to keep the changes, and then click **Yes** in the dialog box to confirm the changes.

Copy a view

1. On the My Views tab, select a view from the list.
2. Click the **Duplicate view** icon in the toolbar. The Duplicate view dialog box opens.
   - If you have the permission View all subscriptions, you can copy views of other users.
3. Enter the name for the view.
   - If you are the owner of the view, the original view name is appended with (1) because you cannot have multiple views with the same name.
4. Click **Save**.

After the view is copied, it shows in the list of view where you can then modify it.

2.4 SUBSCRIPTIONS TAB

InEight Report lets you subscribe users to different reports, which are saved as views for them to receive directly via email on a scheduled basis.

> You must have a saved view to create a subscription.

2.4.1 Subscribing to a report

Subscribe to a report

1. On the Subscriptions tab, click the **Add subscription** icon. The Add subscription dialog box opens.
2. In the subscription overview:
   - Enter a name and description for the subscription.
   - In the Recipient email address field, type the email addresses of all recipients that you want to receive the report. As you type in an email address, a drop-down list shows user addresses in the InEight cloud platform. Select the recipient's email address from the list to include them. If the email address does not already exist in the InEight cloud platform, enter the recipient's email address, and then click **Add**.
   - Assign an owner to the subscription.
   - Select the Inactivate this subscription check box to suspend the subscription without having to delete it.
   - Click **Next**.
3. In the subscription schedule:
   - Select **Daily**, **Weekly**, or **Monthly** in the Frequency drop-down list. Additional fields and check boxes show depending on the frequency you selected.
   - Complete the subscription schedule, and then click **Next**.
4. In the subscription views:
   - In the Name field, select a view to include from the drop-down list. To include multiple views in the subscription, click the **Add views** icon.
   - Select a format from the File type drop-down list to for each view you include in the subscription. Click **Finish**

The subscription you created will show on the Subscriptions tab. Subscriptions also show in the My Views tab at the bottom of the page when you have a view selected.

2.4.2 Modifying a subscription

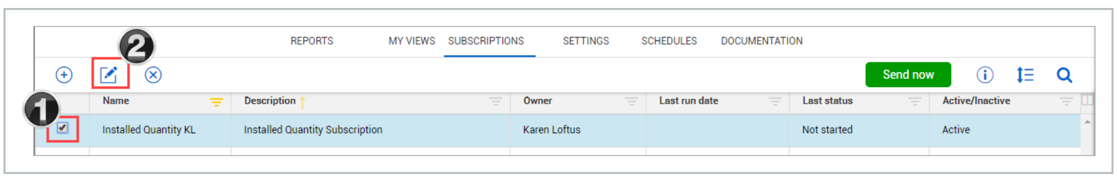
Existing subscriptions can be searched for and inactivated, the owner can be changed if the current owner no longer needs it, or the subscription can be deleted altogether.

You must have the permission Edit all subscriptions to modify subscriptions for another user. To change the owner of the subscription, you must have the permission Change subscription owner.

If you no longer need to send out a report via subscription, but might need it later, you can remove the subscription by making it inactive. This is also helpful if you are setting up anticipated subscriptions for a project that might not be starting right away.

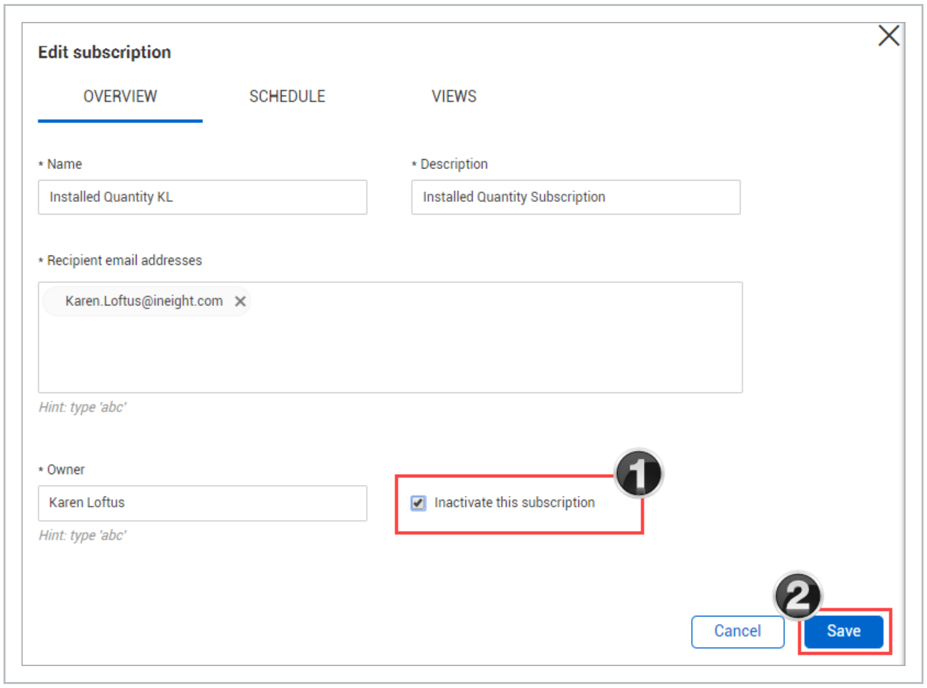
Inactivate a subscription

1. From the Reports page, select the **Subscriptions** tab.
2. On the Subscriptions tab, select the check box for the subscription you want to make inactive.
3. On the left toolbar, click the **Edit** icon.



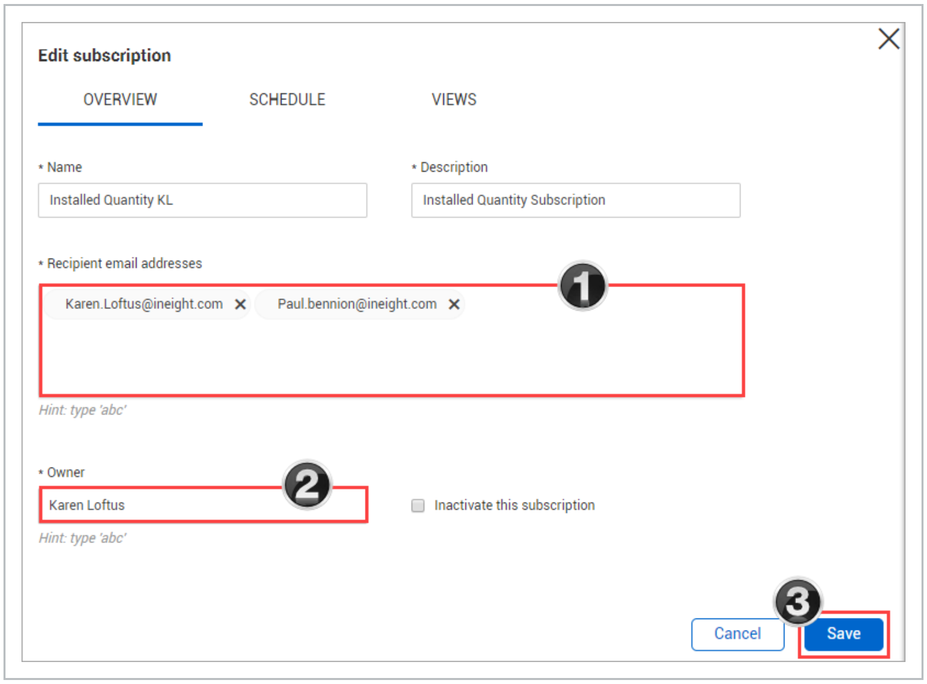
- The Delete subscription icon removes the subscription entirely.

4. In the Edit Subscription dialog box, select the check box **Inactivate this subscription**, and then click **Save**.



Modify a subscription

1. From the Subscriptions page, select the check box for the subscription to modify, and then click the **Edit Subscription** icon to view the report.
    - You can filter by Owner or Active/Inactive to help locate the subscription that you want to modify.
2. Do the following if there are other users included in the Recipient email addresses field that need to keep the subscription:
    - Delete your email from the Recipient email addresses field, and keep or add other names.
    - Change the owner of the report to another user, if needed and you have the required permission.
    - Click **Save**.



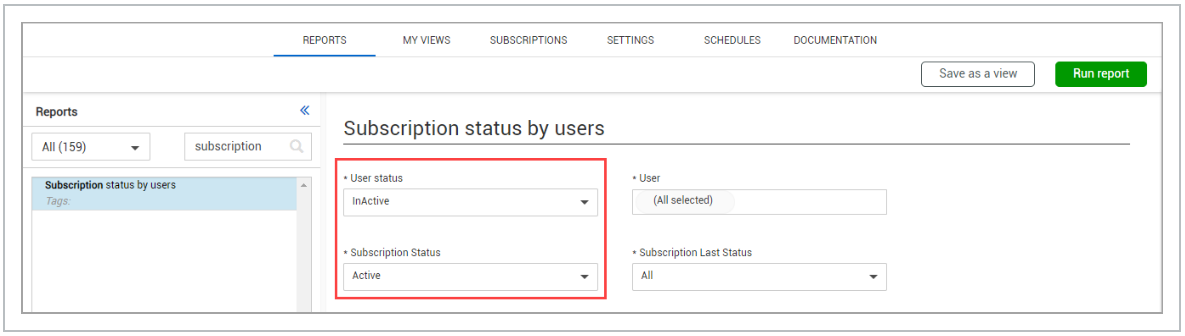
You can also delete the subscription. Select the subscription name, and then click the **Delete** icon.

2.4.3 Subscription status by user

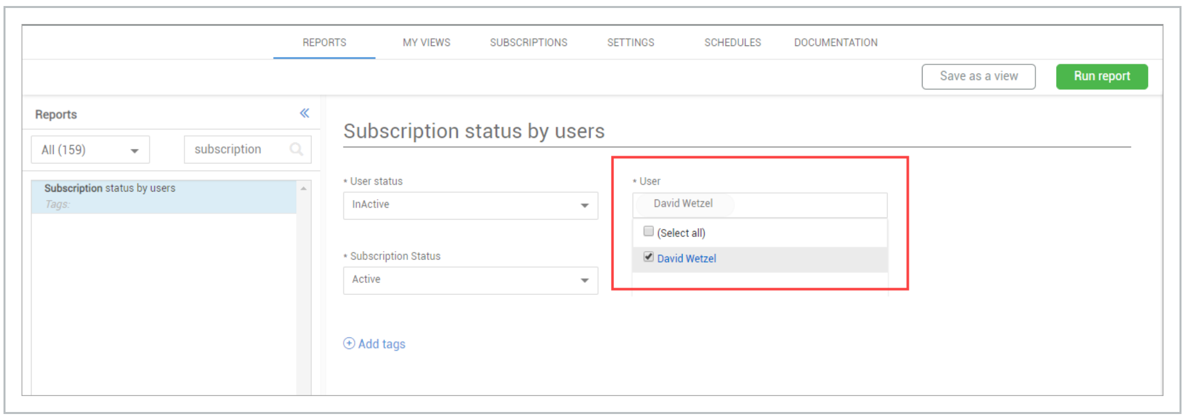
If you are receiving daily, weekly, or monthly reports you no longer need, you can easily rectify that. Running the Subscription Status By Users report makes it easy to identify reports you no longer need.

View subscription status by user

1. From the Reports tab, select the **Subscription Status by User** report.
2. If you want to identify individuals who are inactive but still have reports emailed to them, select **Inactive** for the User Status and **Active** for the Subscription Status. Leave the remaining fields as the default.



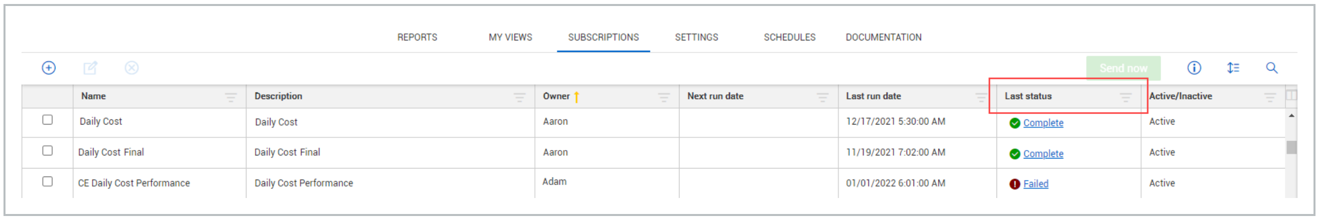
3. Select a person by their name from the User drop-down list. The report shows the users' email addresses, subscription ID and the name of the subscription.



2.4.4 Last status

The Last status column provides a detailed message if an error occurred in the view when the subscription was last run (see the Last run date column). Click the status link to open the dialog box. The message shows the name of the view and a detailed description of the error when the status is either Failed or Partially Successful. You can then go to the My Views tab to correct any errors indicated in the invalid view.

> A Partially Successful status occurs when a subscription is in multiple views but did not fail in all views.



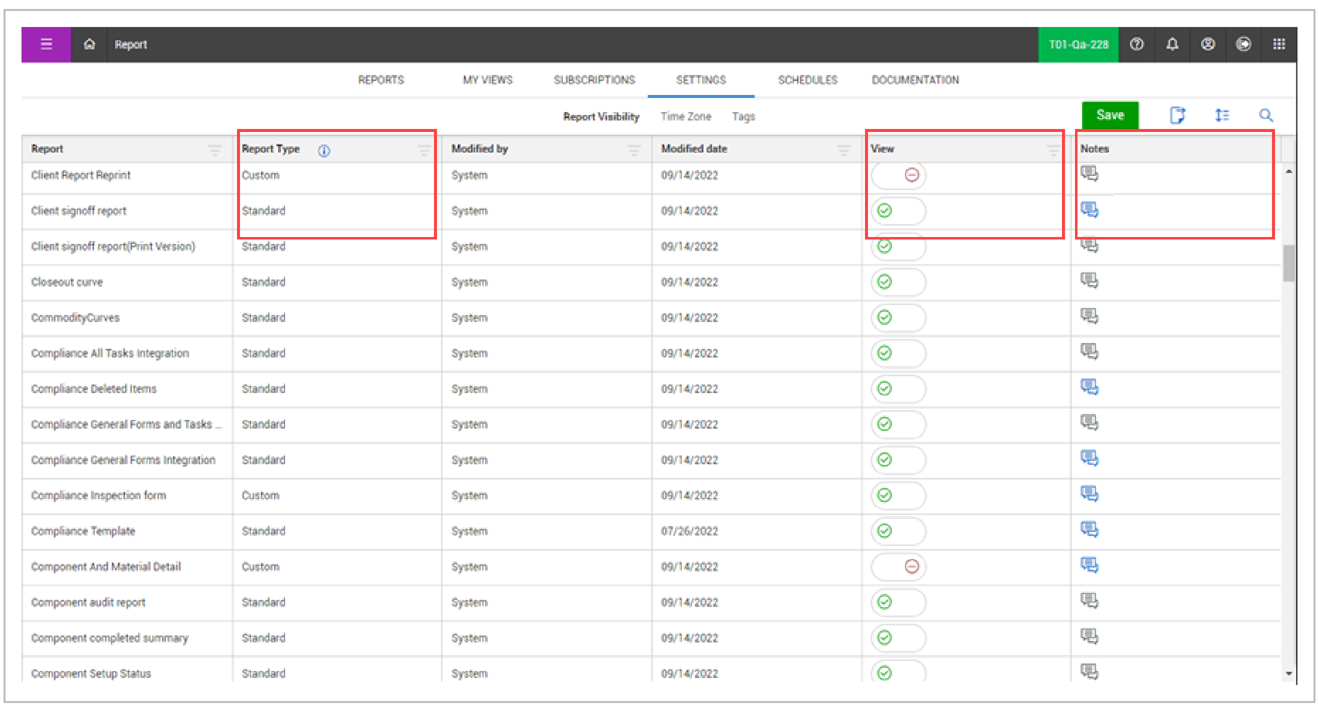
2.5 SETTINGS TAB

The Settings tab and sub-tabs let you modify individual settings for Report. The report visibility list can be exported to CSV file.

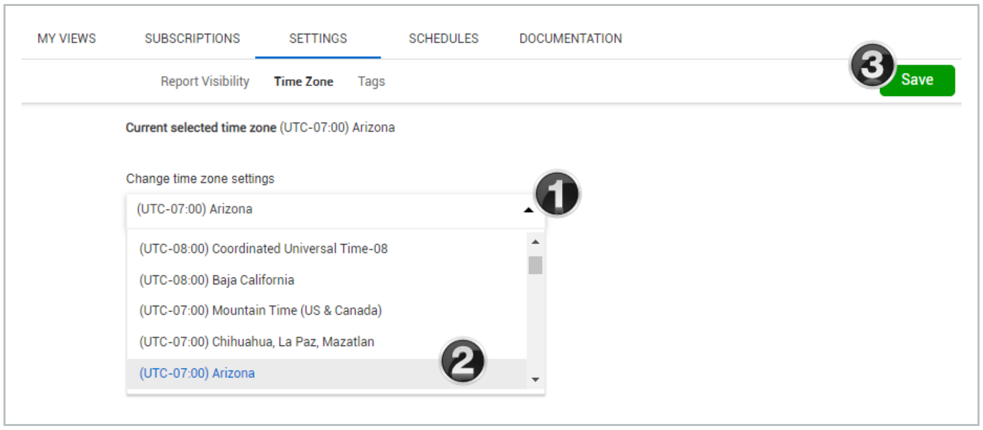
The Report Visibility tab shows a list of all reports along with modification information for each of them. This is tied to the organization and requires permissions to access.

Report visibility management functionality also includes:

- Report type indicator – This column indicates if the report is an InEight standard report or a custom report that is built based on custom business requirements.
- View - The toggle lets you choose whether to show or hide a report in the list. The default for setting is to show the report.
- Notes – This column lets you keep a record of the reports you show or hide with context you can refer to later. When the Notes icon is blue, it indicates context has been added for the report and the notes can be viewed.



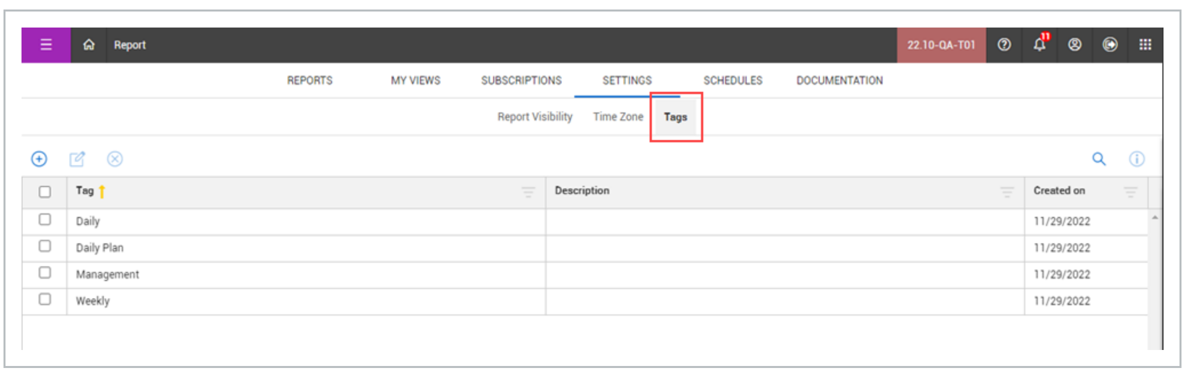
The **Time Zone** can be selected or altered by selecting an option from the drop-down list.



The selected time zone will be used when sending subscriptions and only applies to you as the sender.

2.5.1 Tags

You can create customized tags to help you quickly identify or group certain reports that have the same tag attached. Attach tags to individual reports for easy sorting and filtering. Click Settings > **Tags** to view all tags that you have created.



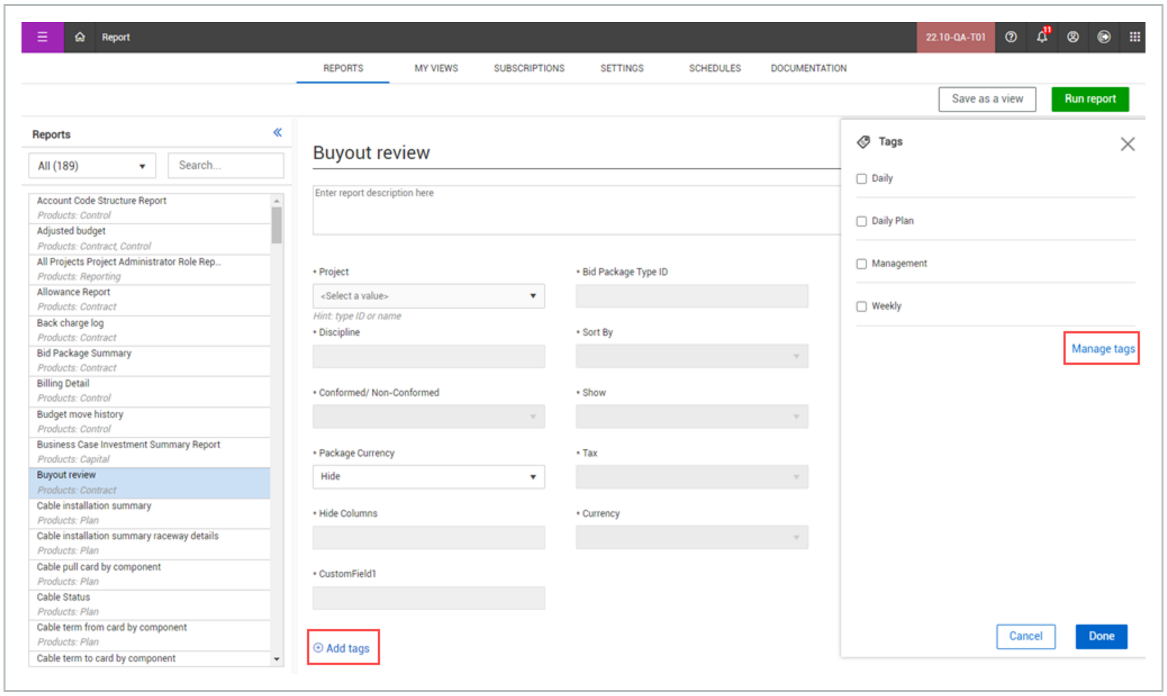
Only you can see and utilize tags. Tags cannot be shared with other users.

2.5 Step by Step 1 – Create a Tag

1. To create a new tag go to Settings > **Tags**. or when you are in a specific report.
2. Click the **Add** icon. The Add/edit tag dialog box opens.
3. Enter a name for the tag and an optional description, and then click **Save**.

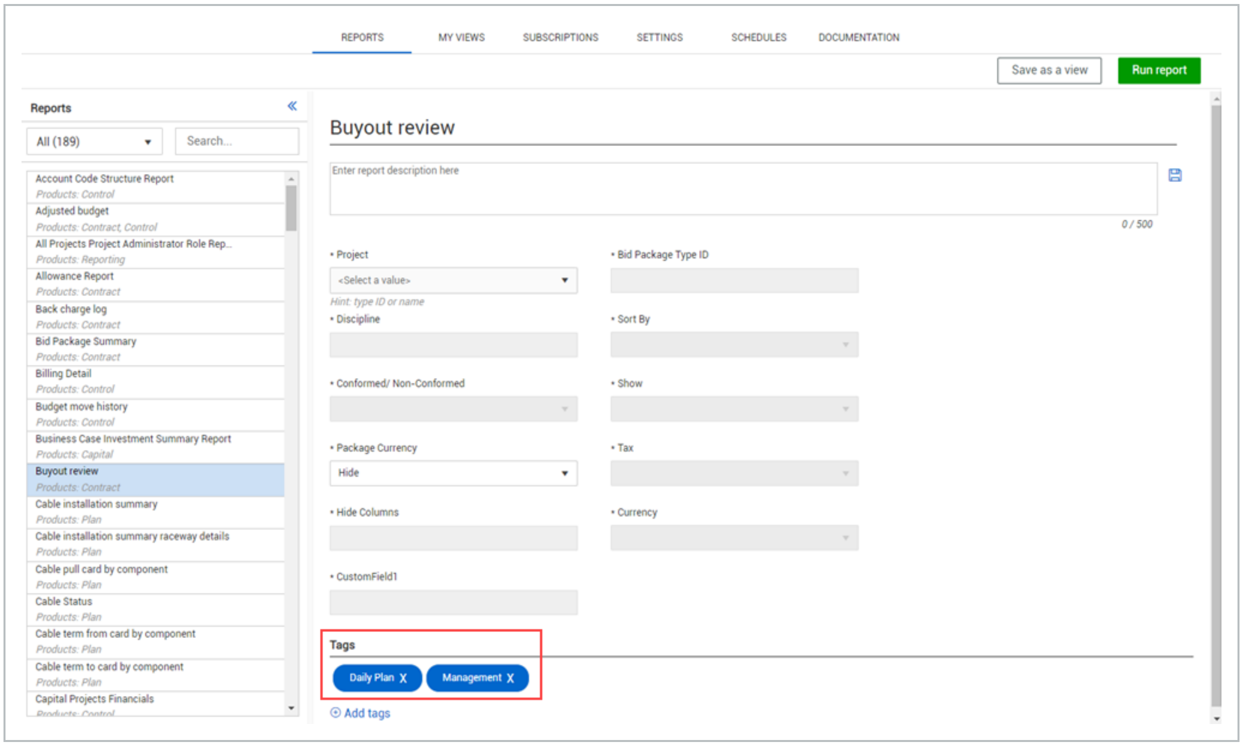
   You can also create a new tag if you are in a report.

   - Click **Add tags** to open the Tags slide-out panel. Click **Manage tags** to open the Settings > **Tags** page.



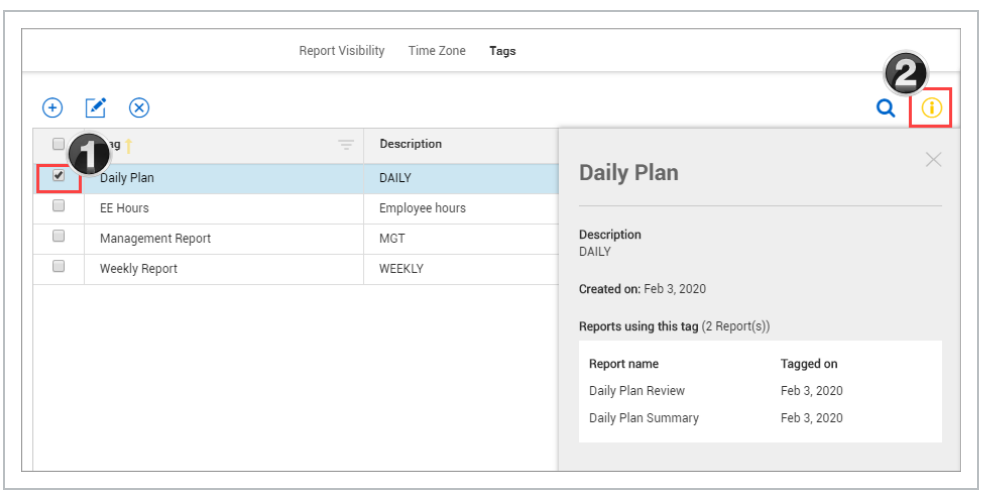
2.5 Step by Step 2 – Add a Tag

1. On the **Reports** tab, select a report.
2. Click **Add tags**. The Tags slide-out panel opens and shows a list of your custom tags.
3. Select the tags that you want to associate with the report, and then click **Done**. The tags will show in the Tags section.



2.5.2 View Reports using a Tag

To view reports associated with a specific tag, go to Settings > **Tags**. Click a tag, and then click the **Show information details** icon.



This shows the reports associated to the tag and the date the tag was created.

2.6 SCHEDULES TAB

The Scheduling Import tool in Report lets you integrate schedule data with other InEight application data. The following reports will consume schedule data:

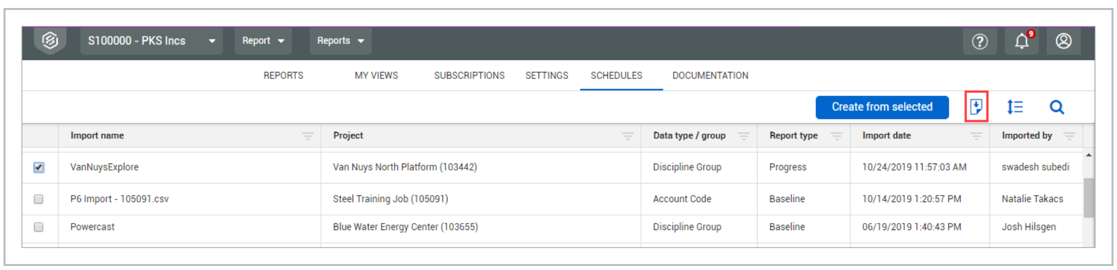
- Construction Progress Summary
- Manhour Curves
- Commodity Curves
- Earned Values

The Schedules tab contains a log of all schedules you have access to see.

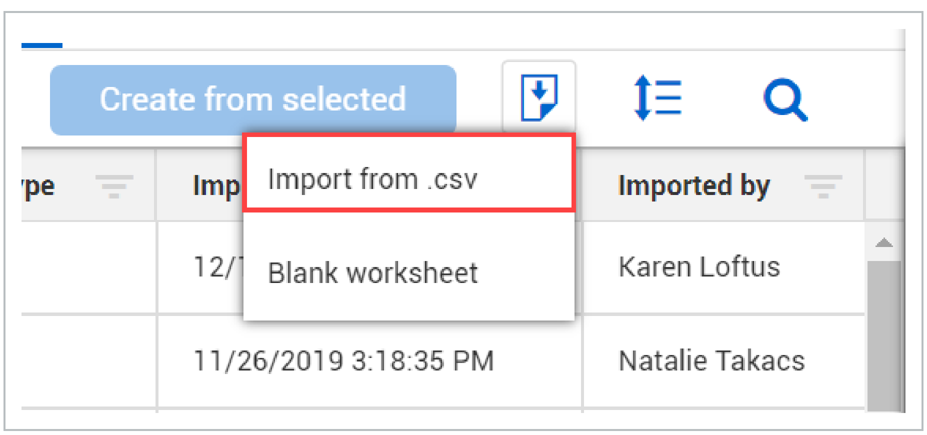
2.6.1 Importing Schedule Files

2.6 Step by Step 1 – Import Existing Schedule File

1. From the **Schedules** tab, click the **Import** icon.



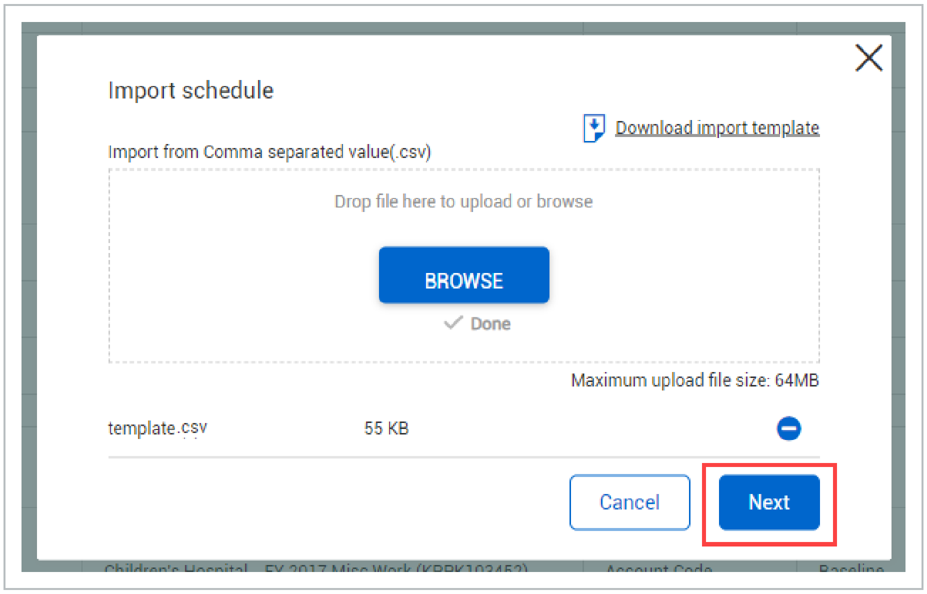
2. If importing a Primavera P6 file (or any other schedule in the specified format), select **Import from.csv**.



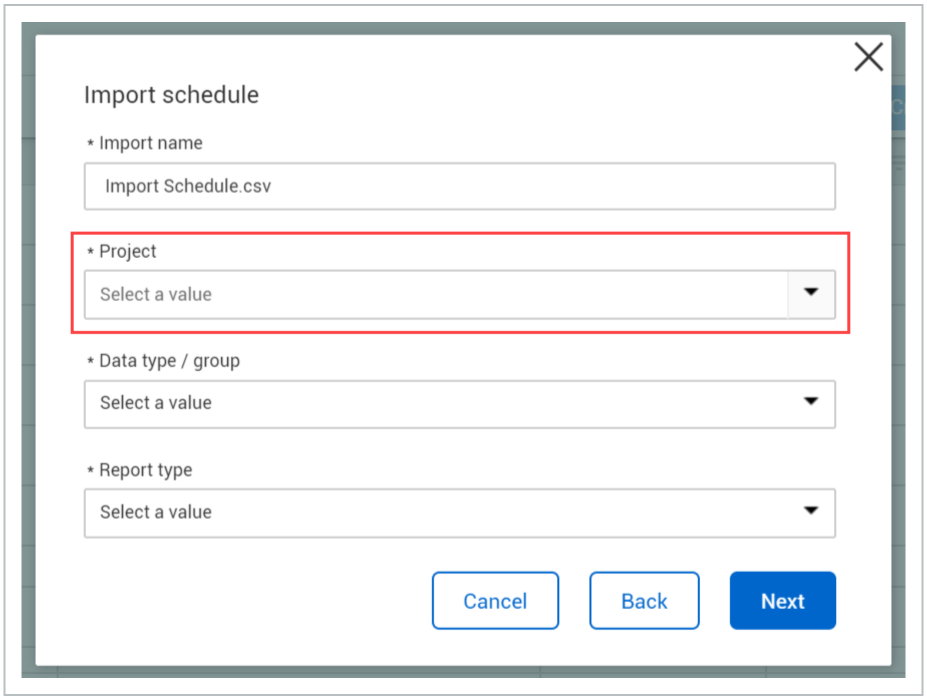
3. In the Import schedule dialog box, drag and drop the file you want to import, or click **Browse** to navigate and select the file.

> You can also select **Download import template** if you want to use a .csv file and fill in the information yourself.

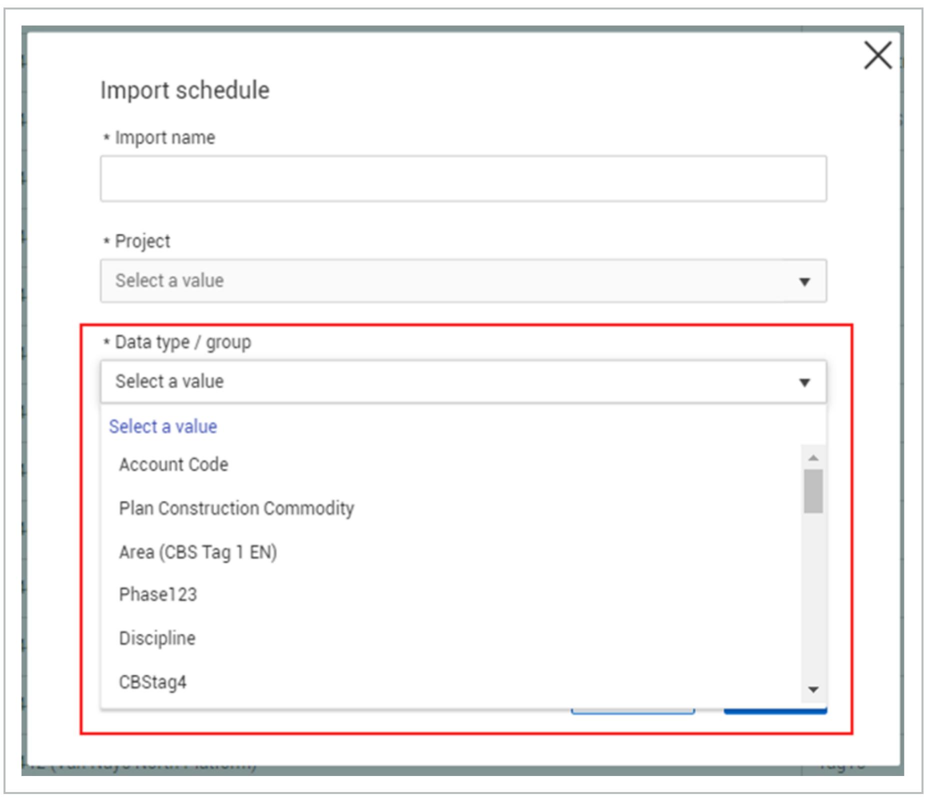
4. After the file is selected, click **Next**.



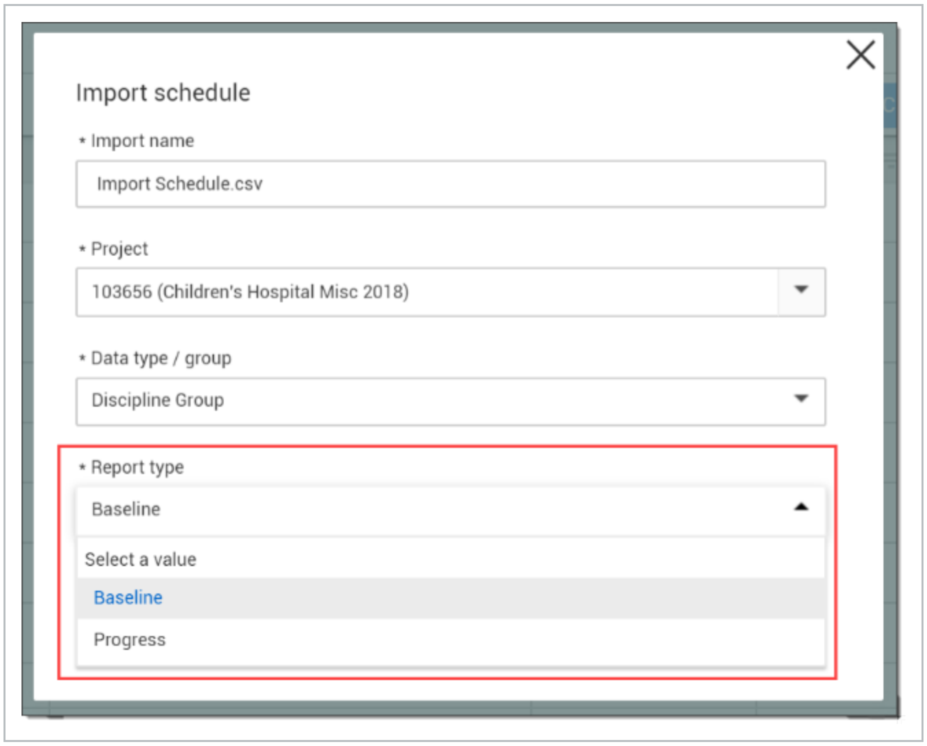
5. The next steps require you to fill in the metadata about this upload. From the Project drop-down list , select a project.



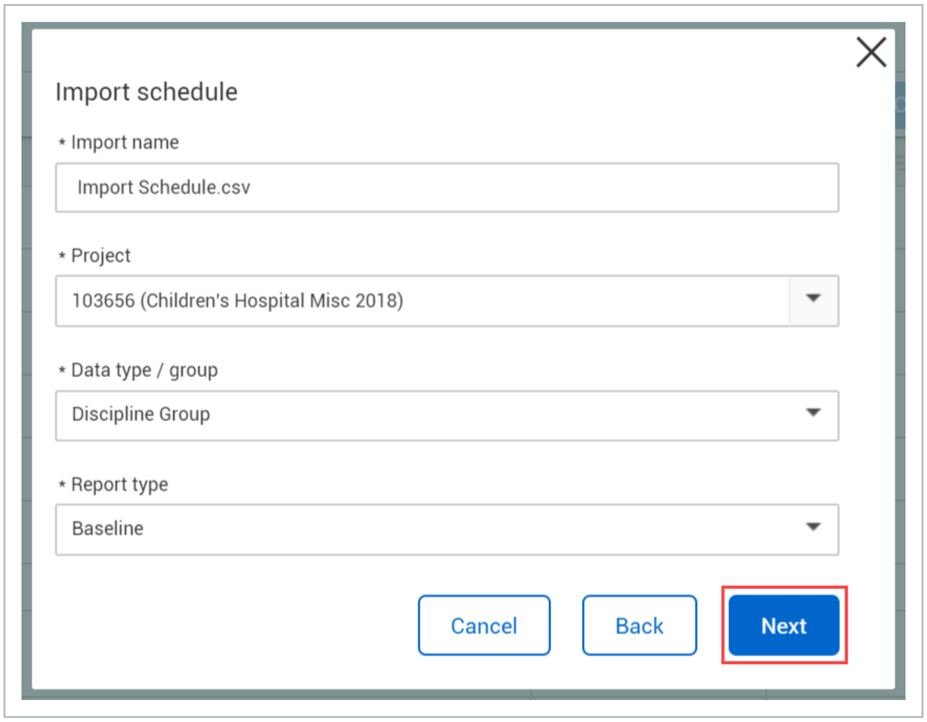
6. From the Data type/group drop-down list, select a value. Options include account code, commodity, CBS tag, discipline, etc.



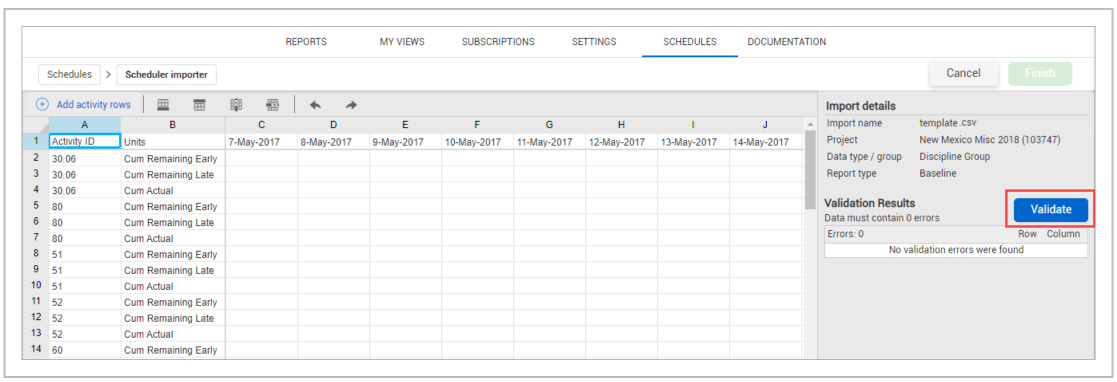
7. From the Report type drop-down list, select a value, where the options are Baseline and Progress



8. Click **Next**.

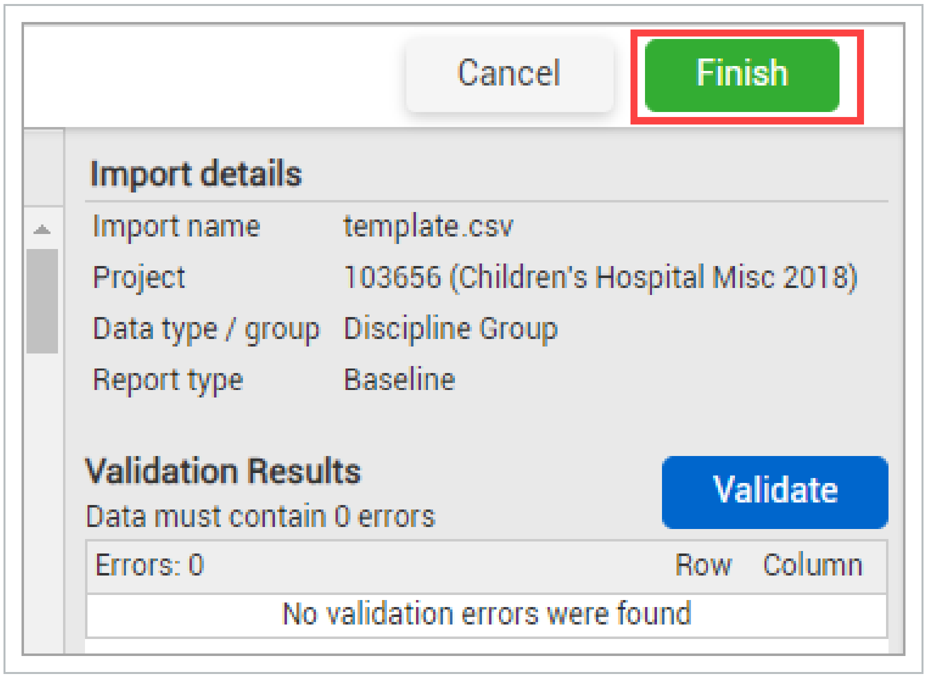


9. On the data editing/validation page, review the data, and then click **Validate**.

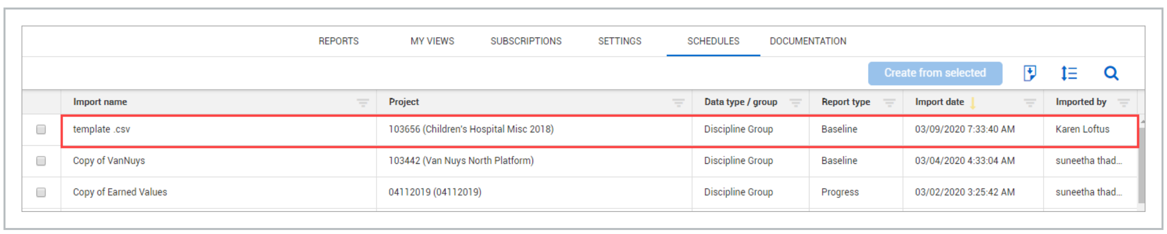


If there is an error in your file, the cell with the error will show highlighted in red.

10. After the file is validated and any errors corrected, click **Finish**.



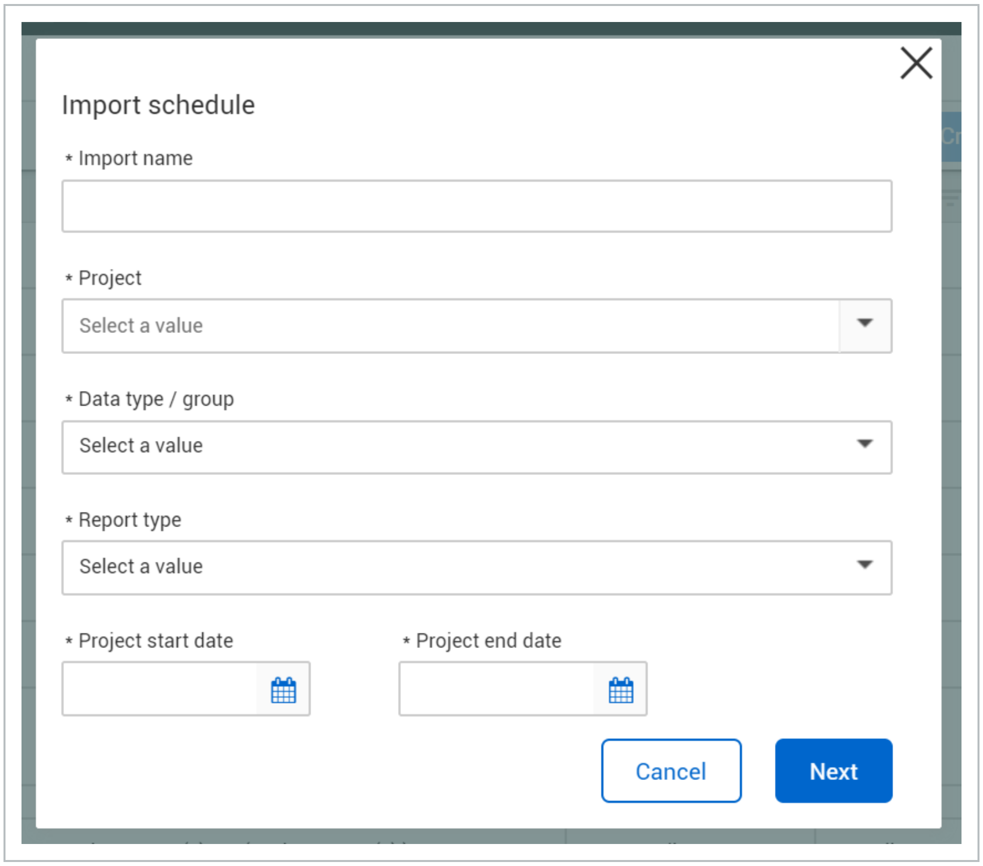
- After your import finishes successfully, you will be redirected back to the Schedules tab.



2.6.2 Updating Schedules

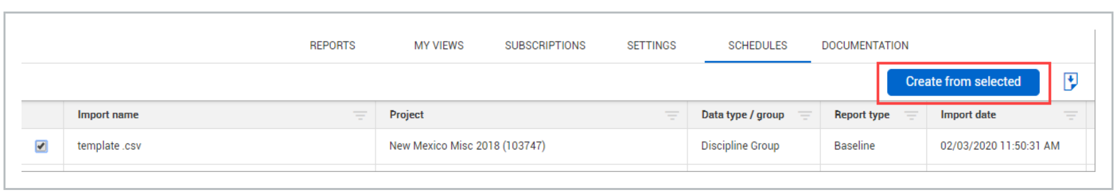
After a schedule has been imported, it can also be updated in the application without having to make changes locally in the .csv file then re-uploading. This process will create a new record in the import log.

> Clicking **Import > Blank Worksheet** brings up an empty Import Schedule.

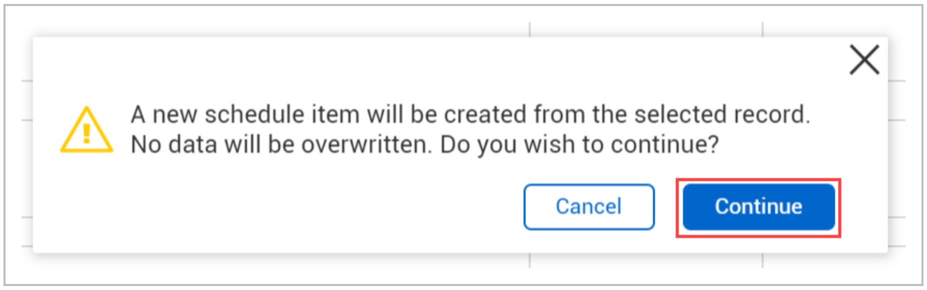


2.6 Step by Step 2 – Update an Existing Schedule

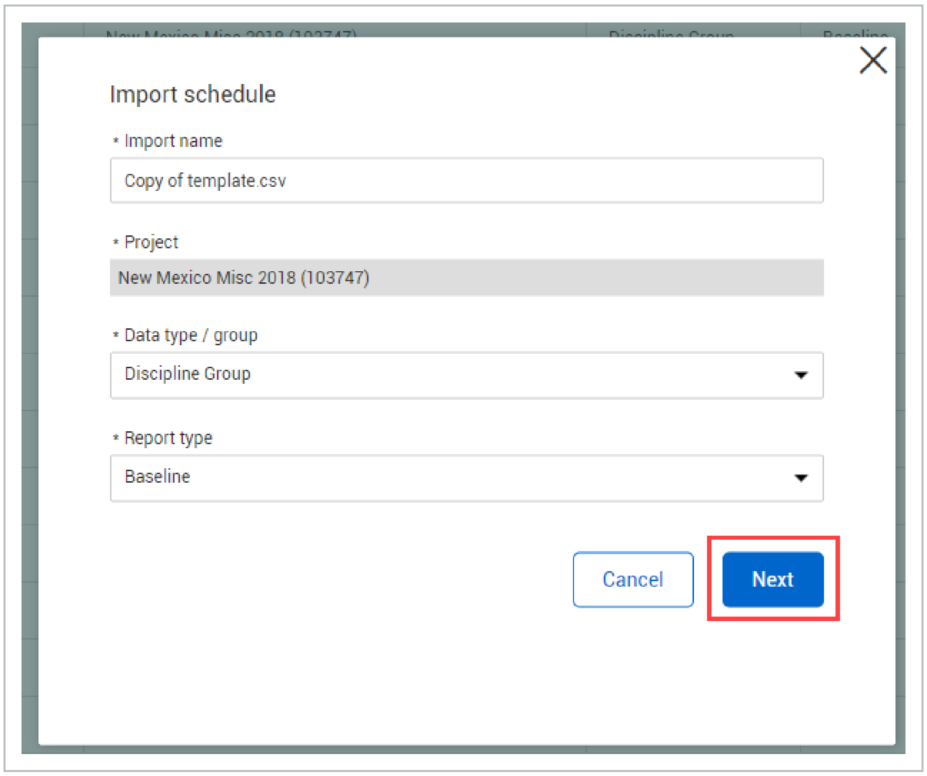
1. On the Schedules tab, select the schedule you want to update by clicking on the corresponding check box.
2. Click the **Create from selected** button.



3. A pop-up box asks you if you want to create a new schedule item from the selected record. Select **Continue**.



4. You will then be directed to the metadata and data entry/validation screens as outlined in the previous section of this document.

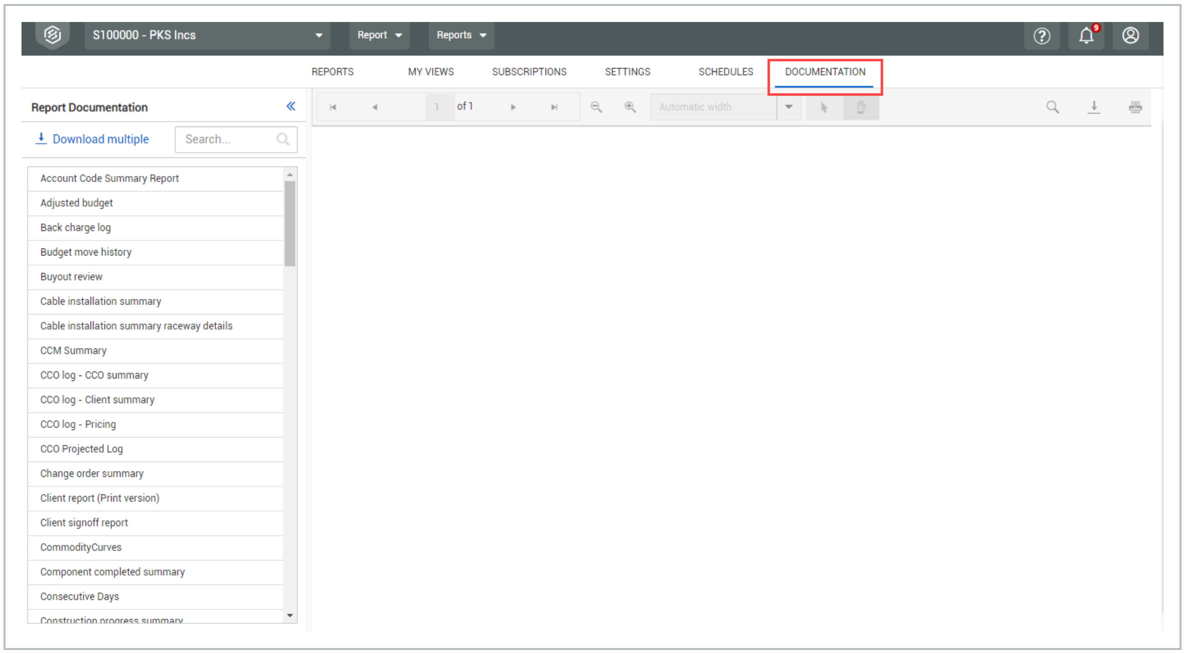


> You may edit a previous schedule and it will automatically save as the latest version, with previous data saved in the database.

> Reports will only reflect the most recent import for each import type [Baseline/Progress, and Account Code/Commodity/Discipline Group].

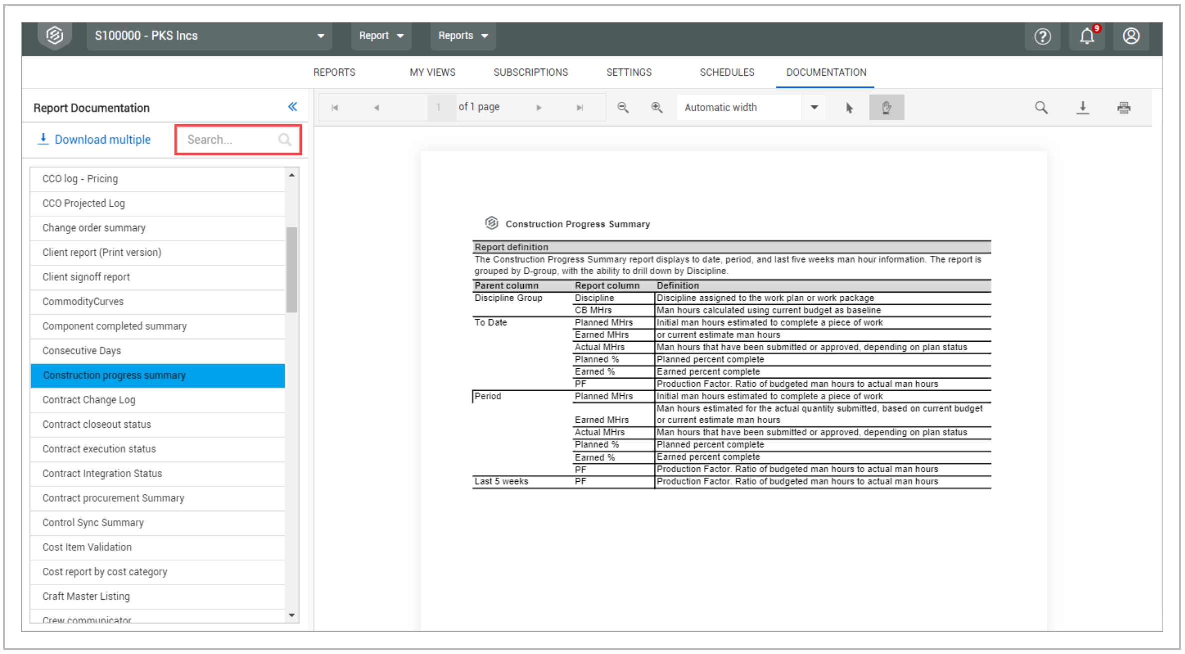
2.7 DOCUMENTATION TAB

The purpose of the Documentation tab is to provide report definition documents in the Report application, without having to first enter a given report.



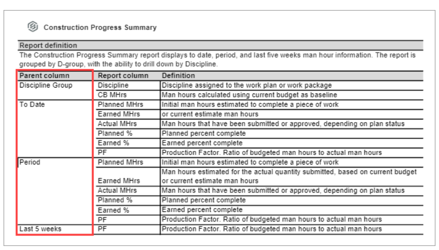
2.7.1 Report Definitions

To find a report description, scroll down the list or use the Search function. When you select a report, a document opens in the main window that provides a brief description, terms used within the report, and corresponding definitions. This document also gives the source of the data and any calculations used to create the columns.



When applicable, a parent column and grouping information is included.

> Parent columns are only in documents of reports that have grouping at the row or column level. Not all RDD documents will contain a parent column.



The toolbar at the top of the page allows you to print or download the report description document. You can also choose to download multiple documents to your local machine at one time.

Download Multiple Documents

1. In the Documentation tab, click **Download Multiple**. The Report Documentation Download dialog box opens.

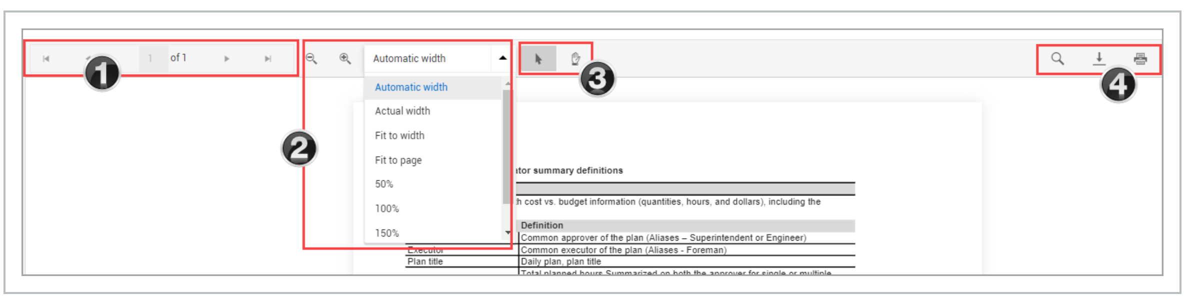
2. The left-side panel shows a list of all available report documents. Select the report documents that you want to download.
3. Click the **Transfer To** icon to move all the selected report documents to the right-side panel.
4. Click **Download**.

> If downloading more than one document, they always download as a .ZIP file. However, if you are only downloading one document, it will download as a single PDF file.

2.7.2 Navigate the Documentation tab

Navigation through the Documentation tab can be accomplished in the following manner:

	Definition
1	If there is more than one page in the report document, the additional icons become active.
2	Zoom in and out, or select from pre-defined widths.
3	Enable selection or panning.
4	Search, download and print.



2.8 REPORT FREQUENTLY ASKED QUESTIONS

What is the data refresh for reports?

Currently, the refresh time of reporting data varies by product. Most products' data refresh utilizes an incremental load methodology. This means, on an interval basis, our database looks for changes in the product databases based on the modified date on the records. Based on the detected changes, the reporting database updates accordingly.

Some products have implemented the architecture for entity change on some or all of their database entities. For those entities we can leverage a trigger-based refresh. This means the fresh data will be reflected in the reports and APIs in near-real-time (five minutes or less).

The rule of thumb, however, is twenty minutes or less for all reports.

> Some reports will have a “**Last data refresh**” timestamp in the header.

How are permissions applied to reports?

The following permissions are applied to reports:

- To access reports, you need the **View reports** permission under **Suite Administration > Roles and permissions > Reporting > Reports**.
- To run reports embedded in other applications, but not access the report list in Report, you need **Suite Administration > Roles and permissions > Reporting > View integration reports**.
- You can show or hide reports for the whole organization. This can be found in **Report > Settings > Report visibility**. There is also a permission under **Suite administration > Roles and permissions > Reporting > Reports called Manage organization report visibility**.

All reports filter data the user can see based on projects they are assigned to in InEight Platform.

For the Compliance and Web Completions reports, the security is based on the user's OBS, module and Reporting tag assignments.

Can I request changes to InEight reports?

For report enhancements, you can open an InEight Support ticket or contact your InEight representative, providing the following information:

- Screenshots from the application where the requested data can be found.
- Mapping document of logic/calculations referencing the screenshots.
- A mock-up of what the desired output will look like or a marked-up version of the existing state of the report.

I'm trying to run a report, but it is taking a long time and I am receiving a blank screen after several minutes. What should I do?

We are held to a two-minute window to run report queries and return data when running reports in the application. Sometimes the volume of the data and the complexity of the report code violate this two-minute rule and the report will "time-out", rendering a blank page and making it look like there is no data.

A work around for this is to set up a subscription for the report (you can use the **Send now** capability as well). Or you can utilize the **Sent to file storage** functionality.

I'm not receiving my subscription, why is that?

With these kinds of issues, it is important to know if it is all users or just single users not getting emails.

Subscriptions have a 30-minute window to run the report queries. This could pose a problem if your subscription is running at a high-volume time.

You can try adjusting the subscription time to 5-15 minutes to avoid busy times. You can do this by manually typing in a time in the subscription wizard instead of selecting an option presented in the UI.

I'm receiving a subscription error that reads **Cancelled by user**, but I did not cancel my subscription. Why is this?

The "user" that's being referenced here is the SSRS Server (this is the mechanism used for processing and sending subscriptions). If your report has timed out, meaning it has reached the 30-minute window and has not completed, the server will cancel the report run. We understand that this verbiage is misleading, but it unfortunately cannot be changed.

I used the Send to file storage functionality and now I'm getting an "**Error 401**" on a blank page in my browser when the report attempts to download. What should I do?

Log in to the application in the browser and click the link from the email again to prompt the download again. You must have an active session to access the file download.

Additionally, there is an InEight Platform permission required to download these documents. Users will need the **Download document** permission under S**uite administration > Roles and Permissions > Organization and project > Documents > View documents**.