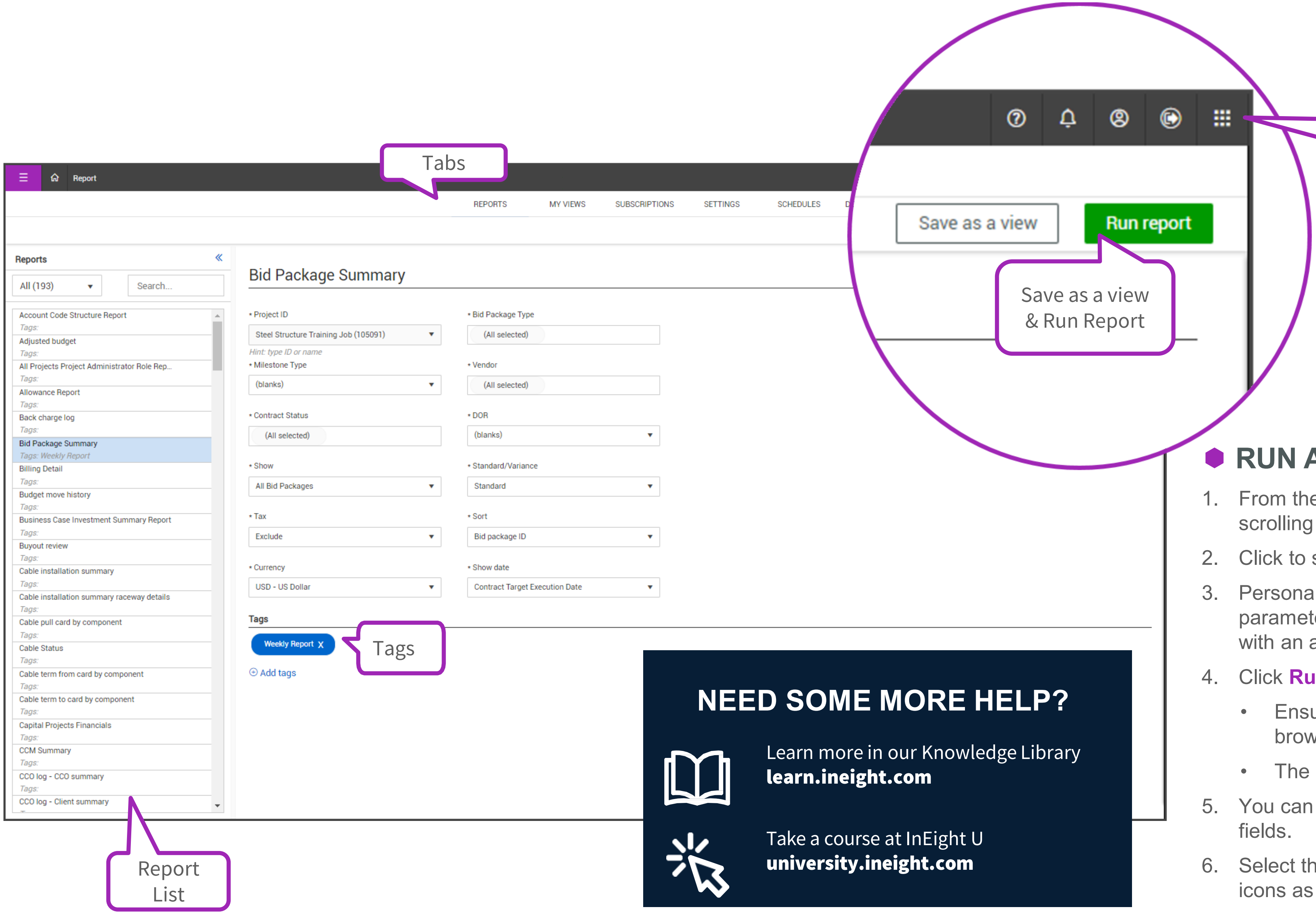
QUICK GUIDE

REPORT NAVIGATION

InEight REPORT



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RUN A REPORT

1. From the **Reports** tab, locate a report via scrolling or using the Search box.
2. Click to select the report.
3. Personalize the report using any of the report parameters, ensuring all required fields shown with an asterisk (*) are selected.
4. Click **Run Report**.
   - Ensure pop-ups are allowed in your web browser
   - The report will initiate and open in a new tab
5. You can continue to modify the parameter fields.
6. Select the **Print** or **Download** icons as desired.

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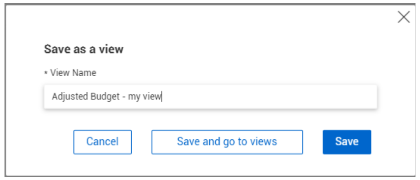
SAVE A VIEW

Used when a particular report with specific parameter needs to be repeated frequently.

1. From the **Reports** tab, locate a report via scrolling or using the Search box.
2. Click to select the report.
3. Personalize the report using any of the report parameters, ensuring all required fields shown with an asterisk (*) are selected.
4. Click the **Save as a View** button.
5. Type in a **View Name**.
6. Click **Save and go to views**.



7. When the **My Views** tab opens, click the **All Views** drop-down, and select **My Views** to view all of your saved views.
8. From here you can modify report parameters, click **Save**, **Cancel** or **Run report**.
   - The “Use Default” checkbox is added to all applicable parameters, and will be applied when run as a subscription

CREATE, ADD & APPLY A TAG

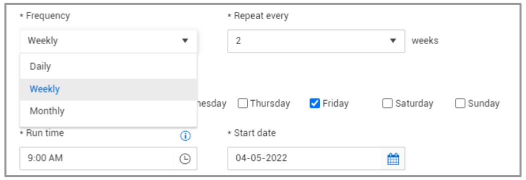
Used when you want to quickly identify or group certain reports that have the same attached tag.

1. View existing tags, by clicking on the **Settings** tab.
2. Click on **Tags**.
3. To create a new tag, click on the **Add** icon.
4. Add the **Tag Name** and optionally, a **Description**.
5. Click **Save**.
6. Click on the **Reports** tab and select a report.
7. Click on Add tags .
8. Check the box for one or more tags.
9. Click **Done**.
   - The tag(s) now appear on right side, underneath the report parameters.

SUBSCRIBE TO A REPORT

Used when you want yourself or others to receive a report directly via email on a scheduled basis. NOTE: This function requires a report to first be saved as a view.

1. Ensure the desired report is already saved as a View, and is visible in the **My Views** tab.
2. Ensure the desired report is already saved as a View, and is visible in the **My Views** tab.
3. Click on the **Subscriptions** tab.
4. Click on the **Add Subscription** icon.
5. Type in a Name and Description for the subscription.
6. Start typing in the recipients’ email address(es).
   - Select your internal company users’ email address as it becomes visible
   - You will need to click **Add** to include others non-company email addresses
7. Your email will pre-populate in the Owner field.
8. Click **Next**.
9. In the 2nd window, identify the **Frequency** and **Repeat Every** fields from the drop-down options.



10. Continue personalizing the **Repeat on**, **Run time**, **Start date** and **End date** options.
11. Click **Next**.
12. In the 3rd window, select the name of your **Saved View report** from the drop-down list. If **Send to file storage** is selected, recipients will receive an email with a link to download the report instead.

13. Click **Finish**.