QUICK GUIDE

REPORTS ESSENTIALS



ACCESSING REPORTS

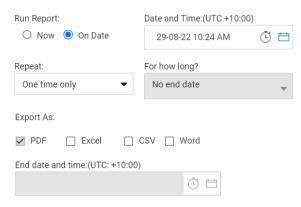


RUNNING REPORTS

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

SCHEDULING REPORTS

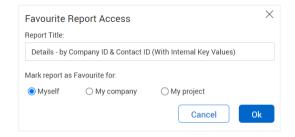
- 1. Select the report you want to schedule.
- In the Report details under Run Report, select On Date.
- 3. Select the following filters:



- 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

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



button.