

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

Run Report:

☐ Now ☒ On Date

Date and Time:(UTC +10:00)

29-08-22 10:24 AM

Repeat:

One time only

For how long?

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).

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

Cancel Ok

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

Copy link

Close

EXPORTING REPORTS

1. Select the  button.

Excel

PDF

Word