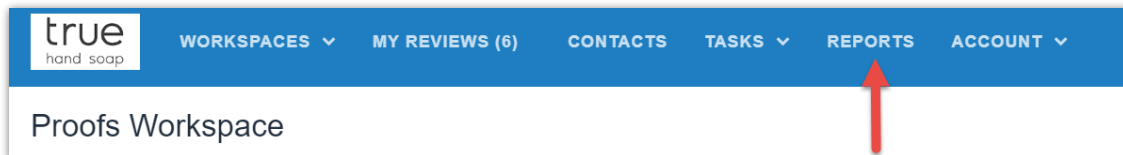


Introduction to Reporting

Published on 01/13/2019

Creating a Report

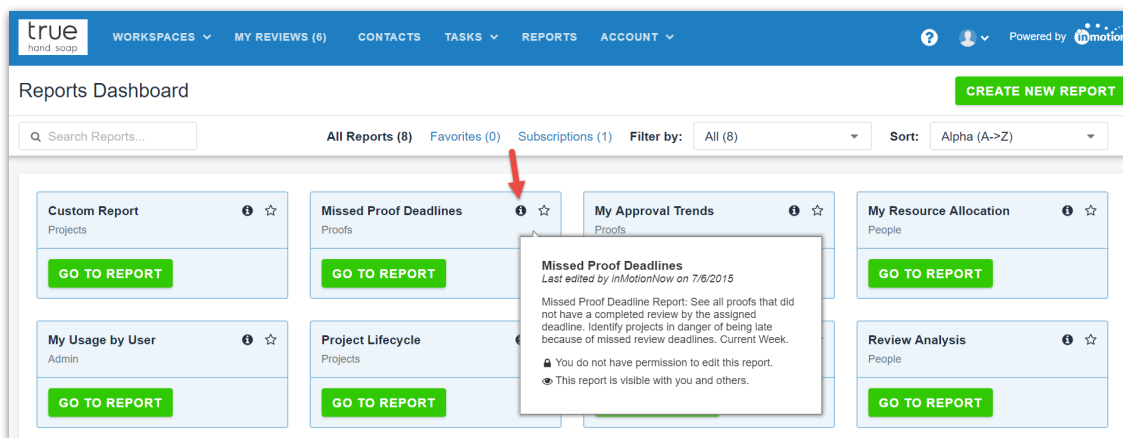
To get started, you will choose the **REPORTS** option in the blue toolbar:



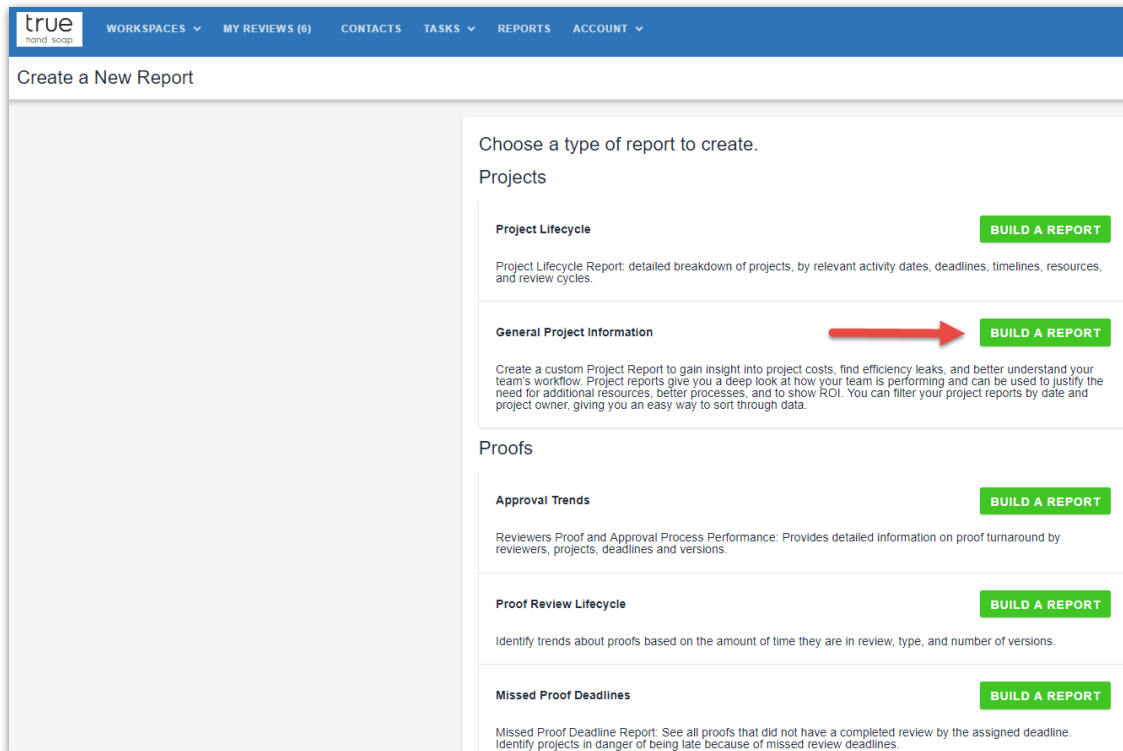
You will be presented with a few default reports that you can run immediately.



Click the "i" to the right of the report titles to see what results will display for each specific report.



To create your own custom report, click the **CREATE NEW REPORT** button in the top right side of the screen. You will find a list of different categories including: Projects, Proofs, People, Admin, Tasks, Timesheets, and Job Launches. Choose an individual report on which to base your customizations. Click **BUILD A REPORT** to continue.



Choose a type of report to create.

Projects

Project Lifecycle [BUILD A REPORT](#)

Project Lifecycle Report: detailed breakdown of projects, by relevant activity dates, deadlines, timelines, resources, and review cycles.

General Project Information [BUILD A REPORT](#)

Create a custom Project Report to gain insight into project costs, find efficiency leaks, and better understand your team's workflow. Project reports give you a deep look at how your team is performing and can be used to justify the need for additional resources, better processes, and to show ROI. You can filter your project reports by date and project owner, giving you an easy way to sort through data.

Proofs

Approval Trends [BUILD A REPORT](#)

Reviewers Proof and Approval Process Performance: Provides detailed information on proof turnaround by reviewers, projects, deadlines and versions.

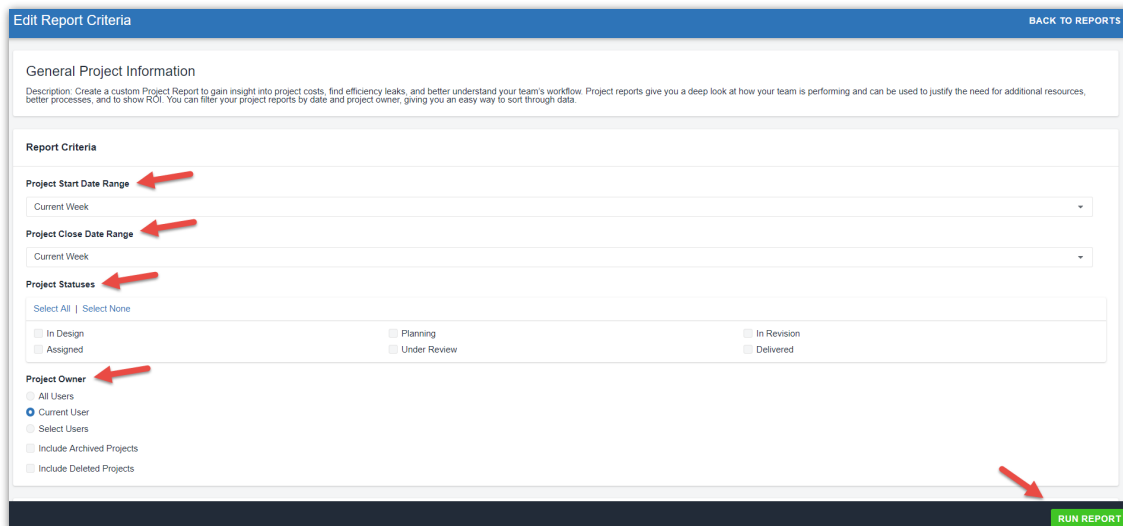
Proof Review Lifecycle [BUILD A REPORT](#)

Identify trends about proofs based on the amount of time they are in review, type, and number of versions.

Missed Proof Deadlines [BUILD A REPORT](#)

Missed Proof Deadline Report: See all proofs that did not have a completed review by the assigned deadline. Identify projects in danger of being late because of missed review deadlines.

Once you have chosen the **BUILD A REPORT** button, you will be brought to a screen where you can choose the criteria that the report will be based on. Make your desired selections and click **RUN REPORT**.



General Project Information

Description: Create a custom Project Report to gain insight into project costs, find efficiency leaks, and better understand your team's workflow. Project reports give you a deep look at how your team is performing and can be used to justify the need for additional resources, better processes, and to show ROI. You can filter your project reports by date and project owner, giving you an easy way to sort through data.

Report Criteria

Project Start Date Range

Current Week

Project Close Date Range

Current Week

Project Statuses

Select All | Select None

☐ In Design ☐ Planning ☐ In Revision

☐ Assigned ☐ Under Review ☐ Delivered

Project Owner

☐ All Users ☒ Current User ☐ Select Users

☐ Include Archived Projects ☐ Include Deleted Projects

[RUN REPORT](#)

When you click **RUN REPORT**, you will be brought to your results.



true
and so on

WORKSPACESMY REVIEWS (0)CONTACTSTASKSREPORTSACCOUNT

Powered by inmotion

General Project Information

EDIT CRITERIADELETESAVE

Edit SubscriptionShare ReportColumns

Report Information

Description

Create a custom Project Report to gain insight into project costs, find efficiency leaks, and better understand your team's workflow. Project reports give you a deep look at how your team is performing and can be used to justify the need for additional resources, better processes, and to show ROI. You can filter your project reports by date and project owner, giving you an easy way to sort through data.

Report Criteria

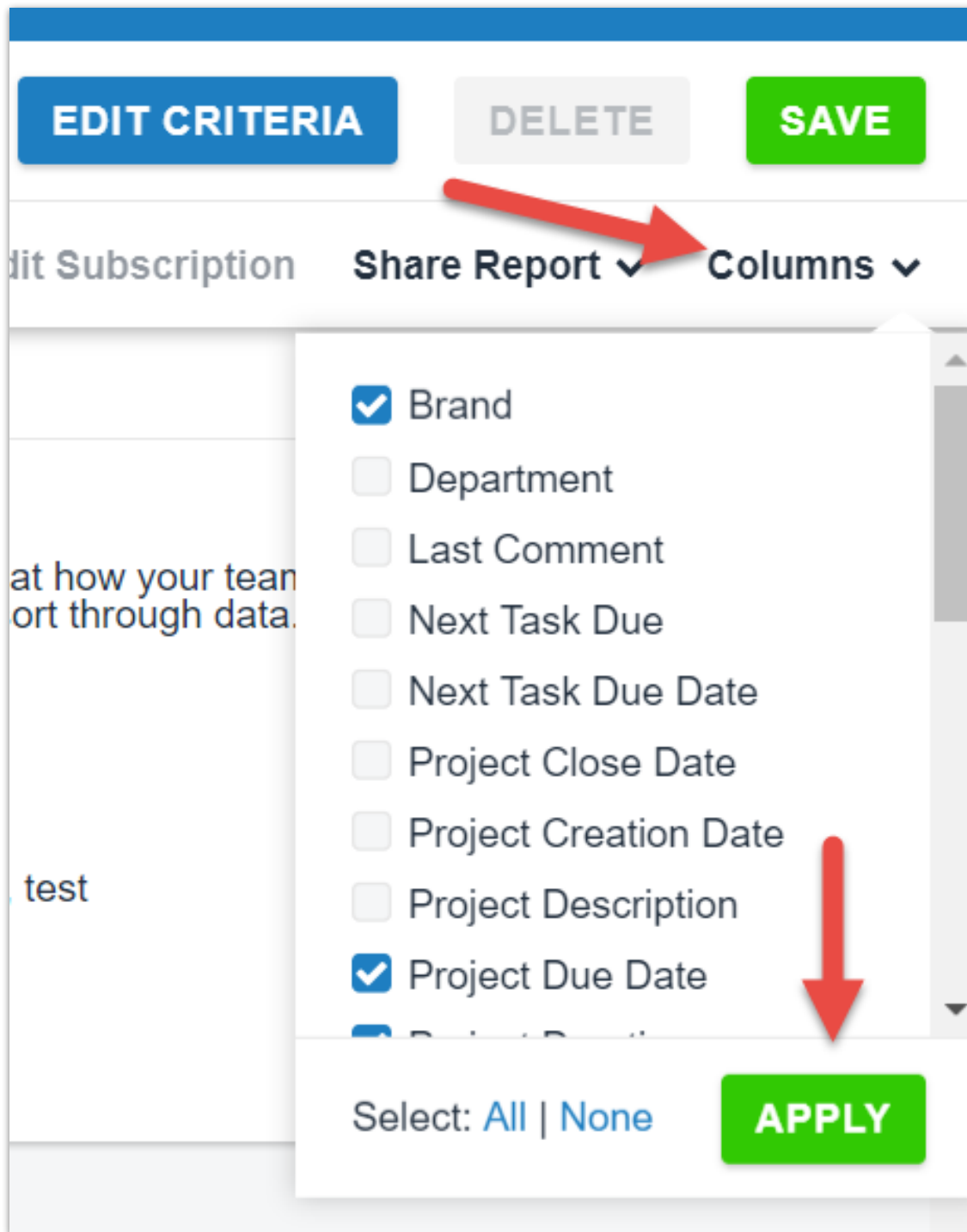
Project Statuses includes the following list: In Design, Assigned, Planning, Under Review, In Revision, Delivered.
Project Owner includes all users: Christy Drucker, Grace Deng, Greg Dixon, Gwen Derby, Megan Diaz, Michelle Corey, Mike Malone, Pam Martel, Paul Morad, Susie Q, test
Includes Include Archived Projects.
Includes Include Deleted Projects.

To group column, right-click on column header and select Group By in the context menu.

Project Name	Project Status	Project Start Date	Project Due Date	Project Duration	Project Owner	Project Members	Project ID	Brand
A1 Autumn Scent Release	Planning	3/6/2018 9:00 AM	4/30/2018 5:00 PM	112 Days 9 Hours 26 Minutes	Paul Morad	Paul Morad, Greg Dixon, Gwen Derby	709348	Seasonal
A02 Autumn Scent Release	Planning	3/13/2018 9:00 AM	4/30/2018 5:00 PM	105 Days 10 Hours 26 Minutes	Paul Morad	Paul Morad, Greg Dixon, Gwen Derby	718150	Seasonal
Autumn Scent Release	Planning	12/29/2017 9:00 AM	9/15/2017 5:00 PM	179 Days 9 Hours 26 Minutes	Paul Morad	Paul Morad, Greg Dixon, Gwen Derby	620976	Seasonal

From here, you can re-arrange the columns by clicking and holding the column headers and dragging them where you want them. Also, you can customize the displayed content by hiding columns you do not want to see and revealing others.

Simply click the **Columns** menu on the top right side of the screen to choose which ones to show or hide and click **APPLY**.



You can also group the report data by certain fields. For example, if you right click the **Project Owners** column and choose, **Group By** the report will show the list in an organized view by owners.

true
hand soap
WORKSPACES ▼ MY REVIEWS (6) CONTACTS TASKS ▼ REPORTS ACCOUNT ▼

Monthly Report

Report Information

Description
Monthly Report for Meetings!

Report Criteria
Project Statuses includes the following list: In Design, Assigned, Planning, Under Review, In Revision, Delivered.
Project Owner includes all users: Christy Drucker, Grace Deng, Greg Dixon, Gwen Derby, Megan Diaz, Michelle Corey, Mike Malone, Pam Martel, Paul Morad, Susie Q, test
Includes Include Archived Projects.
Does not include Include Deleted Projects.

To group column, right-click on column header and select Group By in the context menu.

Project Name	Project Status	Project Start Date	Project Due Date	Project Duration	Project Owner	Project M
Alt Autumn Scent Release	Planning	3/6/2018 9:00 AM	4/30/2018 5:00 PM	112 Days 23 Hours 45 Minutes	Paul Morad	Paul Morad Derby
Alt2 Autumn Scent Release	Planning	3/13/2018 9:00 AM	4/30/2018 5:00 PM	106 Days 45 Minutes	Paul Morad	Paul Morad Derby
Autumn Scent Release	Planning	12/29/2017 9:00 AM	9/15/2017 5:00 PM	179 Days 23 Hours 45 Minutes	Paul Morad	Paul Morad Derby

You can remove the grouping by clicking on the X in the blue project group selector. You can also collapse individual groups by selecting the arrow symbol to the left of the grouping header.

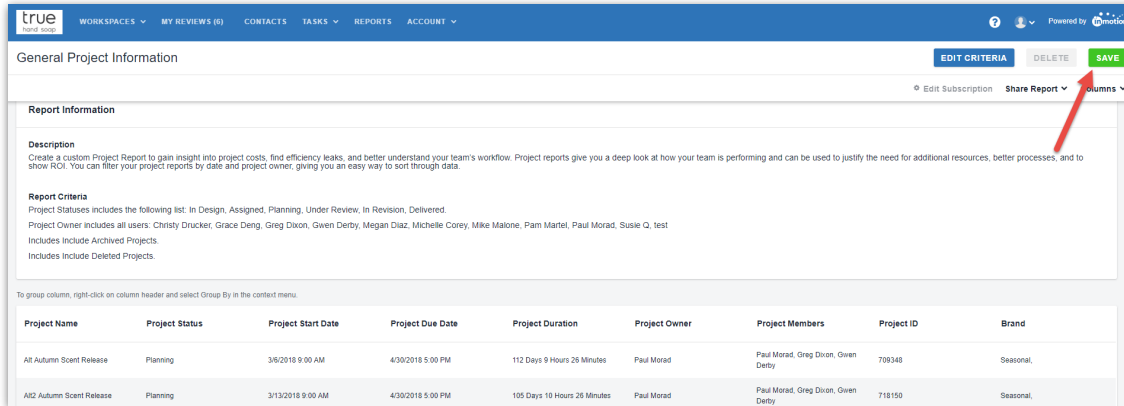
To group column, right-click on column header and select Group By in the context menu.

Project Owner ▼

Project Name	Project Status	Project Start Date	Project Due Date	Project Duration	Project Owner	Proje
Project Owner: Christy Drucker						
LiveWell - Half Page Ad	In Design	9/25/2017 9:00 AM	10/9/2017 5:00 PM	275 Days 1 Hour 33 Minutes	Christy Drucker	Christy Gwen I
Project Owner: Pam Martel						
Fall Scents Email Campaign	In Design	9/6/2017 9:00 AM	9/22/2017 5:00 PM	294 Days 1 Hour 33 Minutes	Pam Martel	Paul M Greg D
Project Owner: Paul Morad						
Alt Autumn Scent Release	Planning	3/6/2018 9:00 AM	4/30/2018 5:00 PM	113 Days 33 Minutes	Paul Morad	Paul M Derby
Alt2 Autumn Scent Release	Planning	3/13/2018 9:00 AM	4/30/2018 5:00 PM	106 Days 1 Hour 33 Minutes	Paul Morad	Paul M Derby
Autumn Scent Release	Planning	12/29/2017 9:00 AM	9/15/2017 5:00 PM	180 Days 33 Minutes	Paul Morad	Paul M Derby
Autumn Scent Release - 003	Planning	3/14/2018 9:00 AM	4/30/2018 5:00 PM	105 Days 1 Hour 33 Minutes	Paul Morad	Paul M Derby
Autumn Scent Release - 004	Planning	3/14/2018 9:00 AM	4/30/2018 5:00 PM	105 Days 1 Hour 33 Minutes	Paul Morad	Paul M Derby

Saving Your Report

You can also save frequently used reports so that they are easily accesible from the reporting dashboard. Once you've customized your favorite report, click **SAVE** in the top right of the screen.



General Project Information

Report Information

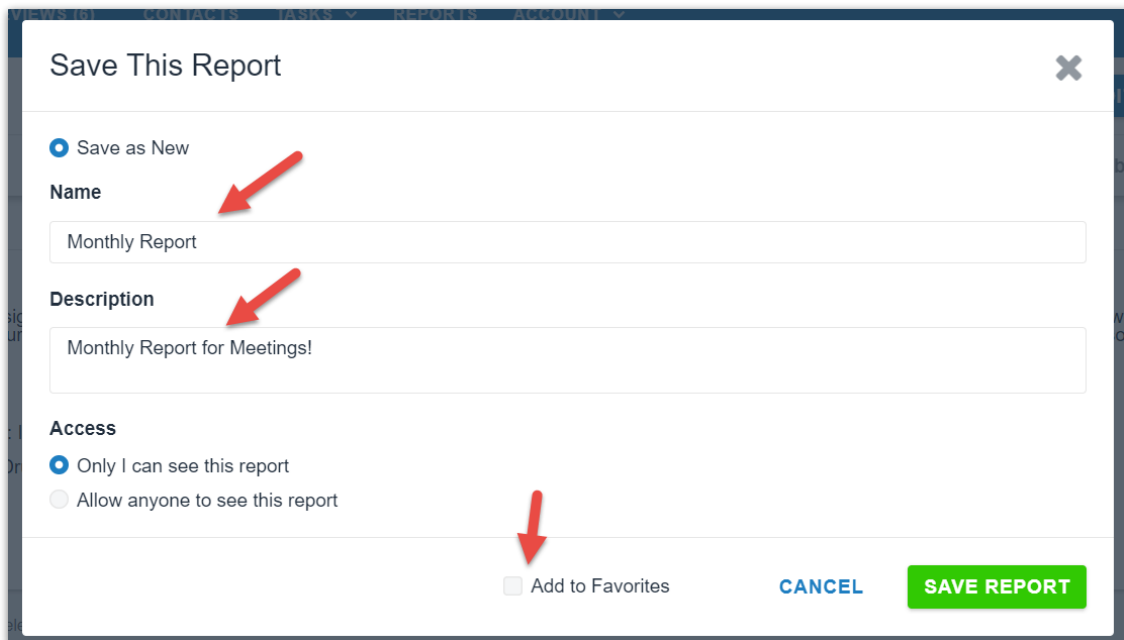
Description
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Includes Include Deleted Projects.

To group column, right-click on column header and select Group By in the context menu.

Project Name	Project Status	Project Start Date	Project Due Date	Project Duration	Project Owner	Project Members	Project ID	Brand
All Autumn Scent Release	Planning	3/6/2018 9:00 AM	4/30/2018 5:00 PM	112 Days 9 Hours 26 Minutes	Paul Morad	Paul Morad, Greg Dixon, Gwen Derby	709348	Seasonal,
All2 Autumn Scent Release	Planning	3/13/2018 9:00 AM	4/30/2018 5:00 PM	105 Days 10 Hours 26 Minutes	Paul Morad	Paul Morad, Greg Dixon, Gwen Derby	718150	Seasonal,

On the following page, you will be required to fill out the **Name** and **Description** fields to save the report. You can choose whether this report is private or available to other users.



Save This Report

☒ Save as New

Name
Monthly Report

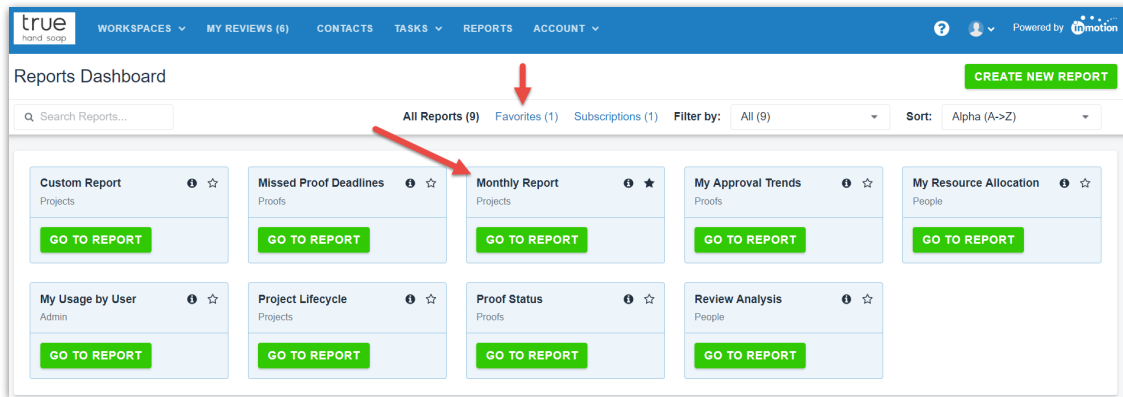
Description
Monthly Report for Meetings!

Access
☒ Only I can see this report
☐ Allow anyone to see this report

☐ Add to Favorites

CANCEL **SAVE REPORT**

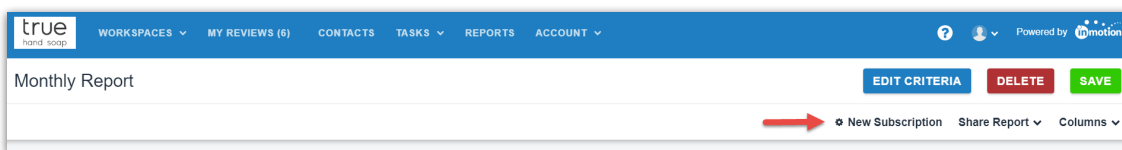
Once you click **SAVE REPORT**, that report will show up under your **Reports Dashboard**. If you selected **Add to Favorites**, it will be added to your Favorites list.



Creating Subscriptions

If you created a report that you need to frequently share with Contacts, you can create a subscription. For example: A manager needs a list of how many projects their team has requested. You can set up a subscription that will send a report to their email daily, weekly, or monthly.

The report must first be saved for the **NEW SUBSCRIPTION** button to appear active. Click [here](#) to create your subscription.



On the following page, you will be able to choose which Contacts to include, how often the report should be emailed to those Contacts, and at what time. Once you finish those selections, you can click **SAVE**.

Need to subscribe a report to a person outside of the system? Quickly add them as a Contact and add them to report subscriptions as needed.

REPORTS

ACCOUNT

Subscription

The report will be sent to you and 1 other.

<input type="checkbox"/>	Name	Email
<input checked="" type="checkbox"/>	Andy Eaves	andy@truesoap.com
<input type="checkbox"/>	Brittany Pais	bpais@inmotionnow.com
<input type="checkbox"/>	Caleb Eisenberg	caleb@truesoap.com
<input type="checkbox"/>	Callie Egerton	callie@truesoap.com
<input type="checkbox"/>	Chris Cuda	chris@truesoap.com
<input type="checkbox"/>	Christina Edmond	christina@truesoap.com

How often should this report be sent?

☒ Selected Days
 ☐ Monthly

☐ Sunday
 ☒ Monday
 ☐ Tuesday
 ☐ Wednesday
 ☐ Thursday
 ☐ Friday
 ☐ Saturday

The report will be sent: Monday

What time should this report be sent?

9:30 AM

🕒

☒ Is Enabled

CANCEL

SAVE

You can always go back to that report and edit who receives those emails or how often by clicking **EDIT SUBSCRIPTION**.

EDIT CRITERIA

DELETE

SAVE

➔

⚙ Edit Subscription

Share Report ▾

Columns ▾

Exporting Reporting Data (Excel, Word, PDF)

Reports can also be exported to Excel, Word or PDF to make it easier to view or share. If you want a read-only view of the report, export it to PDF.

To download your report, Click **Share Report** in the top right of the screen and choose the desired file type.

