
REPORTS USER GUIDE

DOCUMENT MANAGEMENT

INEIGHT 

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CONTENTS

CHAPTER 1 — RUNNING REPORTS	5
1.1 Offline Reports	7
1.2 Scheduling of Reports	7
1.3 Creating Favorite Reports	8
CHAPTER 2 — CUSTOMIZING REPORTS	9
CHAPTER 3 — MAIL REPORTS	11
CHAPTER 4 — DOCUMENT REGISTER REPORTS	13
CHAPTER 5 — TRANSMITTAL REPORTS	15
CHAPTER 6 — WORKFLOW REPORTS	19
CHAPTER 7 — PACKAGE REPORTS	23
CHAPTER 8 — TASKS REPORTS	25
CHAPTER 9 — ADMINISTRATION REPORTS	27

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CHAPTER 1 – RUNNING REPORTS

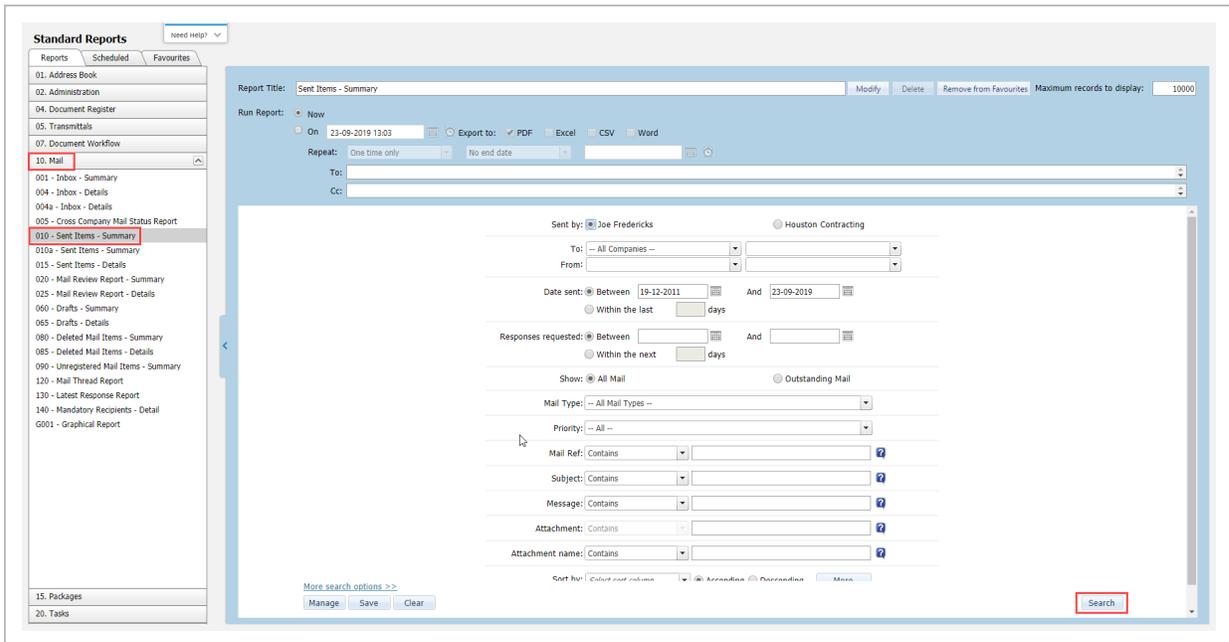
There are a number of standard reports available within InEight Document. The Standard reports are accessed using the steps below.

1. Click Reports from the top menu area.

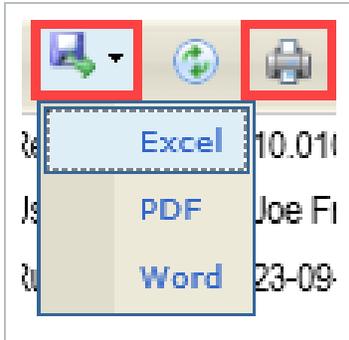


2. The available Report types are listed in the left hand pane:
 - 2.1. Address Book
 - 2.2. Administration
 - 2.3. Document Register
 - 2.4. Transmittals
 - 2.5. Document Workflow
 - 2.6. Mail
 - 2.7. Packages
 - 2.8. Tasks
3. Select the report type to see the list of related reports.
4. Click the required report.
5. Enter/select the required attribute options for the report on the right hand side of the screen (in a similar way to using the Advanced search window).

6. Click **Search** to run the report.



7. Click **Export** and select Excel, PDF or Word to export to the relevant format. To print the report select the **Print** button (available in Internet Explorer only).



8. Use the search box and **Find/Next** options at the top of the report window to search within the report output on screen.



NOTE Inactive contacts will only be listed on Mail, Address book and Admin reports if they are ticked in the Address book to be included in reports.

1.1 OFFLINE REPORTS

For large and complex reports that take more than a few minutes to generate, it is possible to generate reports offline, removing the potential impact on other users by minimizing the impact on system performance.

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.

1.2 SCHEDULING OF REPORTS

Frequently used reports can be scheduled to run automatically at pre-defined intervals and distributed to a nominated group of recipients.

To schedule a new report:

1. Select the report you wish to schedule.
2. Change the **Run Report** option from **Now** to **On** and select a date.
3. Choose the file format for exporting.
4. Select the repeat option as Weekly, Monthly etc. with an **until** or **on** date.
5. Select the scheduled report recipients using the **To:** and **CC:** fields.
6. Click the **Search** button to schedule the report based on the above options.

Report Title:

Run Report: Now On

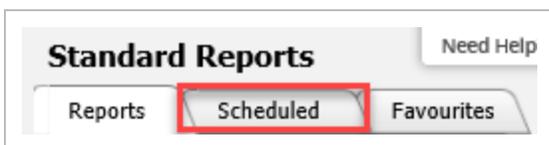
Export to: PDF Excel CSV Word

Repeat:

To:

Cc:

7. To see a list of schedule reports (and/or modify any of them), use the **Scheduled** tab at the top of the Standard Reports generation window.



1.3 CREATING FAVORITE REPORTS

Favorite reports can be defined at a Server, Project, Company or User level using the Favorites Tab in the Reports module.

To add a Favorite report:

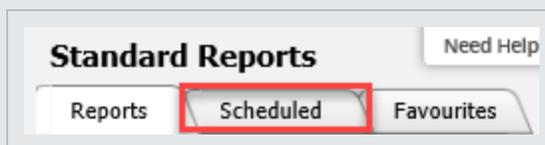
1. Within the Reports module, select the report you want to add.
2. Click the **Add to Favorites** button above the report scheduling options.



3. Give the report a meaningful title and set the visibility of the report (based on access permissions).

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.



CHAPTER 2 – CUSTOMIZING REPORTS

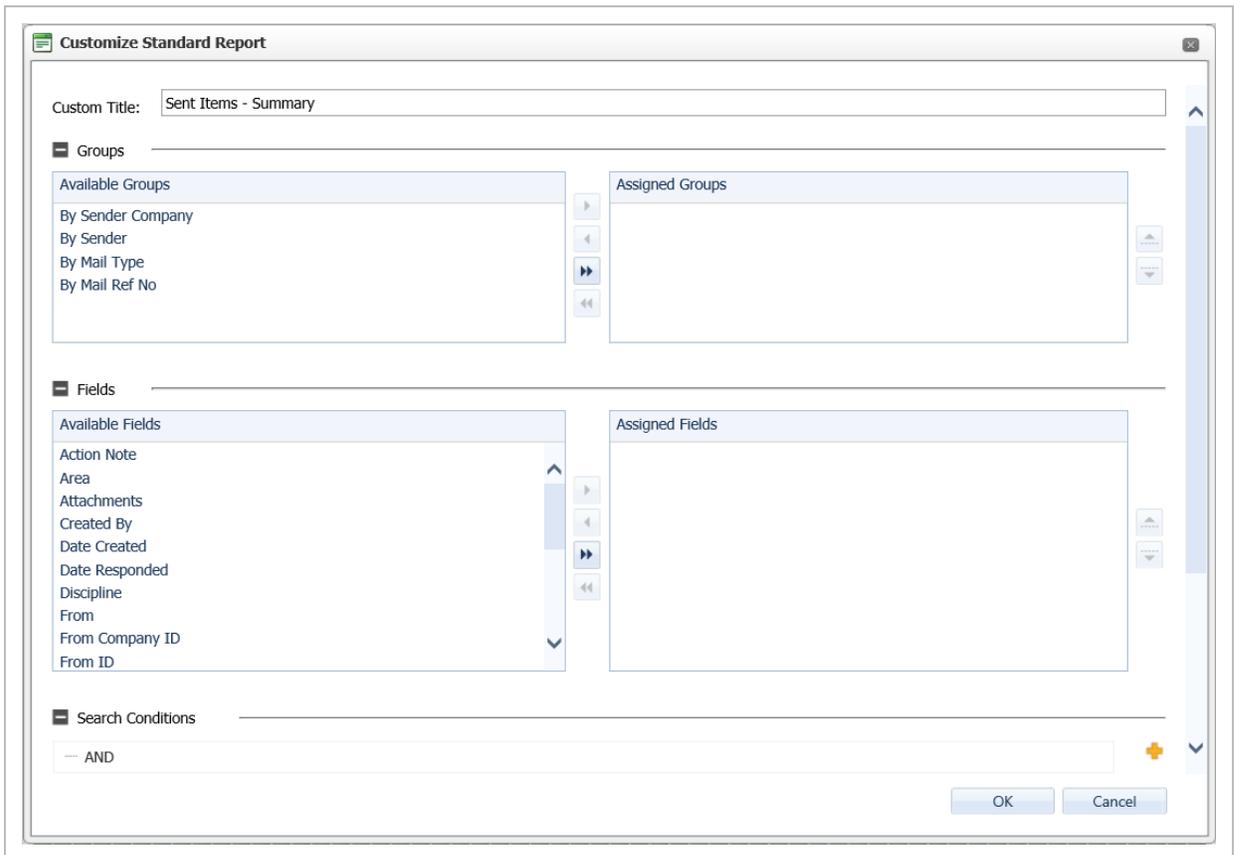
Standard Reports can be customized to a limited extent to meet company specific requirements.

To customize a report, from the Reports window:

1. Select the standard report you wish to customize.
2. Click the **Modify** button. This opens a new window.



3. Enter a custom title for your report.



4. Define your customized report using the Groups and Fields options. For example, if generating a report on Documents you may want the report sorted by Discipline then status. In this case you would select Discipline from the “Groups” area and “Status” from the “Fields” area.

5. Once the required selections have been made, adjust the order in which they will appear in the report from left to right using the up and down arrows on the right.
6. Next, click the + button to open the advanced search window to define the default search criteria for the report and click **OK**.
7. Click **OK** once more to close the Customize window.
8. Once created, Custom Reports are added to the standard reports listing with a report number allocated automatically. This is based on the standard report number plus an alpha suffix which commences from “a” for the first custom report created.

07. Document Workflow

001 - Review Summary - by Discipline

005 - Review Summary - by Document

005a - Review Summary - by Document

010 - Review Details - by Reviewer

010a - Review Details - by Reviewer, incl

Total Duration and Type

CHAPTER 3 – MAIL REPORTS

NOTE

When running any of the reports below, listed mail items are always subject to the security settings of the user running the report (both in term of mails types and whether they have access to Company, Department, or Personal Mail).

Report No.	Title	Description
001	Inbox – Summary	This report is based on a summary register of mail in the Inbox. Duplicate mail items will be excluded from the report if this setting has been applied to the user’s Inbox prior to running the report.
004	Inbox – Details	A detailed register of incoming mail that includes the details of responses (linked mails) made to each mail by users within the same company as the logged in user.
005	Cross Company Mail Status Report	This report can only be used if the recipient of mail has the “Allow the sender to see the status of the mail in my inbox” option ticked in their user preferences. If this option is ticked then this report provides visibility into the status of recipients for the sender running the report.
010	Sent Items – Summary	This report is based on a summary register of mail in the Sent Items mailbox.
015	Sent Items – Details	This report shows mail in the Sent Items Mail box with options to include: <ul style="list-style-type: none"> • The response received against each mail item. • A list of people who have NOT responded (ie replied to or forwarded the mail) as requested for each mail item.
020	Mail Review Report – Summary	This report shows mail sent for review with details on when it was sent, reviewer(s),the review status, and any comments.
025	Mail Review Report - Details	This report is as per report 020 with some additional details provided for each mail item.
060	Drafts – Summary	This report is based on a summary register of mail in the Drafts mailbox.

Report No.	Title	Description
065	Drafts – Details	This report is as per report 060 with some additional details provided for each mail item.
	Deleted Mail Items – Summary	This report is based on a summary register of mail in the Deleted Items mailbox.
085	Deleted Mail Items - Details	This report is as per report 080 with some additional details provided for each mail item.
090	Unregistered Mail Items – Summary	This report displays details of all unregistered mail items and their processed status (one row per item) subject to the search criteria selected.
120	Mail Thread Report	This report displays any mail associated with a thread. Both the root mail of the thread and all the linked mails together with the status of each mail and the thread status are listed.
130	Latest Response Report	This report displays both the root mail of the thread and last reply mail of the thread.
140	Mandatory Recipients – Detail	This report displays the users assigned as Mandatory Recipients in the To and Cc fields.
G001	Graphical Report	The Graphical Report option allows a variety of graphical based reports to be generate based on either the Inbox or Sent Items. For example, the number of mail items by type received on a periodic basis.

CHAPTER 4 – DOCUMENT REGISTER REPORTS

Report No.	Title	Description
001	Details - by Document	This report is a simple register of all documents with options to include all revisions, only the latest revisions etc. This report is subject to the document access rules of the user running the report.
015	Summary Report - by Status and Revision	<p>This is a powerful cross tabulation of the number of documents uploaded each period (e.g. Month) to InEight Document by Revision and Status. On the Y access each Revision + Status combination is listed. On the X axis the number of documents uploaded at that Revision and Status combination for each period is detailed.</p> <p>Search options provided when running this report include:</p> <ul style="list-style-type: none"> • Document Status • Discipline • Type • Document No Contains • Title Contains • Date Range for the report.
020	Document Access Details – By Document	Lists user access (including formats) by document.
025	Document Access Details – By User	Lists document access (including formats) by user.
060	Discipline Matrix Unassigned Users	Lists by discipline, users who are NOT part of the default distribution matrix.
075	Document Comments –	Lists the text comments made against each document in the Document Register.

Report No.	Title	Description
	by Document	
080	Deleted Documents – by Document	Lists all documents that have been deleted.
090	View Files – Download History	Allows users to generate a report of View Files downloaded from the InEight Document system across a date range. The report includes who downloaded each View File and the date downloaded.
100	Transferred Documents Report	This report lists all documents that have been processed into the current document via the Unregistered mail option Process Transmittal as Document.
110	Replace / Remove View Files History	Lists all View Files that have been replaced or removed from documents.
120	Document Linked – Items	Lists all documents that have links to other items including links, associated module(s) and reference number.
G001	Graphical Report	This report represents information as a histogram.

CHAPTER 5 – TRANSMITTAL REPORTS

NOTE

When running any of the reports below, the visibility of Company vs Personal transmittals is subject to the security settings of the user running the report.

Report No.	Title	Description
001	Details - By Transmittal No.	This is a simple register of Transmittals and associated documents .
005	Details - By Recipient (Contact)	This is as per Report 001 but sorted by Recipient.
010	Transmitted - by Document (Not Downloaded only)	Lists recipients of transmittals who have not downloaded the files associated with that transmittal.
015	Transmitted - by Recipient (Not Downloaded only)	This report lists by recipient, documents received by transmittal, but not downloaded.
020	Pending - by Document	Lists pending transmittals by Document, where recipients have received previous revisions of the document by Transmittal, but not the latest revision.
025	Pending - by Recipient (Contact)	For each Recipient lists pending Transmittals containing documents which they haven't received the latest revision of.
030	Pending - by Company	For each Company, lists pending Transmittals containing documents where at least one user has received a previous but not the latest revision.

Report No.	Title	Description
035	Recipient Document Register - by Document	Lists the recipients who have received access to each document (by transmittal only. The report shows the current revision and status of the document and the last revision and status sent to each recipient (which if different would be a pending transmittal).
040	Recipient Document Register - by Recipient (Contact)	This report effectively details for each recipient the documents they are on the distribution for (based on distribution by transmittal only) – i.e. the documents which recipients have been issued by transmittal. The report shows the current revision and status of each document and the last revision and status sent to each recipient (which if different would be a pending transmittal).
045	Recipient Document Register - by Company	This report is as per Report 040 but is generated for each company, regardless of which user in a company has been issued the documents by transmittal. If document was transmitted to several users in the same company, it will only be listed once for the company on this report.
050	Document Distribution Matrix	This is a cross tabulation report with documents on the Y axis (grouped by Discipline) and companies on the X axis and is used to detail which companies have access via transmittal to which documents. Access is indicated by showing the last revision sent against the document under each company that has access to the document.
060	Transmittal Review Report – Summary	This is a summary report displaying transmittals from the Drafts register for which the review is either pending or in progress. It shows the previous and current reviewer only.
065	Transmittal Review Report – Details	This report is as per report 060 but shows details regarding all reviewers (when there is more than one) of each Transmittal.
100	Inbox – Summary	A simple register of Incoming Transmittals without details of the documents on the transmittals.
105	Sent Items - Summary	A simple register of Sent Transmittals without details of the documents on the transmittals. Note that cancelled transmittals are excluded from this

Report No.	Title	Description
		report by default.
110	Inbox – Details	A simple register of Incoming Transmittals with details of the documents on the transmittals.
120	Linked Transmittal Inbox Response Summary – By Transmittal	Lists incoming transmittals and the reference number of any outgoing transmittals manually linked as a response
125	Linked – Items	Lists and provides associated details for all outgoing transmittals that have links.

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CHAPTER 6 – WORKFLOW REPORTS

Report No.	Title	Description
001	Review Summary - by Discipline	<p>Lists the documents that have passed through a workflow or are currently in a workflow (even if not yet activated) for each Document Discipline. This includes:</p> <p>Total Days Scheduled for review.</p> <p>Total Days To-date - either the actual days taken to complete the review (for completed reviews) or (for incomplete but activated reviews) the days the document has been in review so far.</p> <p>Total Days left which for completed reviews = 0, and for reviews in progress is the scheduled completion date less the system date in days. The report also details the Scheduled and Actual Completion dates for each review. The Scheduled completion date is based on the sum of the scheduled durations for each reviewer who has not yet completed the review (for serial reviews) or, the longest duration for any of the reviewers not yet finished (for parallel reviews).</p>
005	Review Summary - by Document	<p>As per Report 001 but sorted by Document Number rather than Discipline.</p>
010	Review Details - by Reviewer	<p>Lists the documents that have been allocated for review, by Reviewer, and includes completed, in- progress, and awaiting activation workflows. Details include:</p> <p>Total Days Scheduled for review (this is the scheduled days for the reviewer, not the total review period for the document).</p> <p>Total Days To-date which is either the actual days to date since the reviewer was notified to commence their review (for incomplete reviews), or the actual days taken for the review (for completed reviews). Again, this is for the reviewer themselves and not for the review process in total.</p> <p>Total Days left which for completed reviews = 0, and for reviews in progress is the scheduled completion date less the system date in days. The report also details the Scheduled and Actual Completion dates for each document regarding the review. Once the workflow is activated,</p>

Report No.	Title	Description
		the schedule date is empty for reviewers who have not yet been notified.
015	Review Details - by Document	As per report 010 but sorted by Document. Hence for each document it lists the details of each reviewer as per Report 010 and is ideal for analyzing the status of a workflow for a document and when each reviewer completed their review (or not as the case may be).
020	Reviewer Comments - By Document	Lists documents that have passed through a workflow or are currently in a workflow (even if not yet activated) and for each document details the text-based comments made by each reviewer.
025	Review/Release Summary – By Document	<p>Lists the release status of each document that is either in or has passed through the workflow process. For each document the Review Coordinator is listed with the following information:</p> <p>Total Days Scheduled for the release process (between completion of the review by all reviewers and the release).</p> <p>Total Days To-date which is either the actual days to date since the review coordinator was notified that the reviewers had completed their reviews (for documents not released), or the actual days taken for the release process (for released documents).</p> <p>Total Days left which for released documents = 0, and for documents in the process of being released is the scheduled the completion date less the system date in days.</p> <p>The report also details the Scheduled and Actual Completion dates for each document regarding the release.</p> <p>Finally, the Status is listed.</p> <p>When running this, a number of useful filter options are available such as running the report only for documents where the release is due in the next X days.</p>
030	Review/Release Summary – By Review Coordinator and Document	This report is similar to report 025 except that the report is sorted by Review Coordinator and then Documents (so that all documents relating to a Review Coordinator are grouped together) rather than just by Document Number.

NOTE

To generate a report listing the Review Teams, use Report 100 – Document Rules – Review Teams which can be found under the Administration group of reports.

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CHAPTER 7 – PACKAGE REPORTS

Report No.	Title	Description
001	Tender Documents - Released and Downloaded Only	Lists documents released for tender and for each document details the Recipient, the documents they have downloaded, and the date downloaded.
005	Packages – Sent Summary Report	Lists all packages that have been issued. Choose between Tender Package, Standard Packages or both.
010	Packages – Sent Detailed Report	Lists all packages that have been issued and includes recipient details. Choose between Tender Package, Standard Packages or both.
015	Standard Documents – Issued and Downloaded Only	Lists all Standard Packages that have been issued.
020	Package Award Details – By Package	Lists details of all tender packages that have been awarded.
030	Inbox Summary Report	Lists all packages that have been received by your company.
035	Inbox Detailed Report	Lists all packages that have been received by your company and lists the documents included in each package.
040	Tender Acknowledgement Detailed Report	Lists the acknowledgement status for each recipient of tender package invitations or addendum notifications.
045	Linked Items	Lists Packages that have related links with the details of the links listed.

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CHAPTER 8 – TASKS REPORTS

Report No.	Title	Description
005	Summary Report on Tasks Assigned to me	Displays a summary list of all Tasks that have been assigned to the logged in user.
010	Summary Report on Tasks created by me	Displays a summary list of all Tasks that have been created by the logged in user.

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CHAPTER 9 – ADMINISTRATION REPORTS

NOTE

Some reports are only available to administrators or those with delegated administration access (for nominated roles such as Review Coordinators).

Report No.	Title	Description
Report Group: Address Book		
001	Details - by Company ID & Contact ID	A simple address list report of all contacts (with Contact ID in brackets) in the address book sorted by Company and User.
005	Details - by Company ID & Last Name	Similar to Report 001 but sorted by Company and Last Name of the contact.
010	Details - by Contact ID	Similar to Report 001 but sorted by Contact ID.
015	Details - by Last Name	Similar to Report 001 but sorted by Last Name of the contact.
020	Details - by Company Type	Similar to Report 001 but sorted by Company Type.
025	Details – by User Type	This is a useful report to print User Details with filter options for: <ul style="list-style-type: none"> • External contacts • Restricted Users • Users Allocated to Security Groups • Users who are not external contacts and are not yet allocated to a security group
030	Details - by Active Users	Similar to Report 001 but includes only Active Users.
100	Contact Groups	A report on the contacts belonging to each contact group.

Report Group: Administration

Report No.	Title	Description
015	Notifications History – by Notification Type	<p>Enables Administrators to generate a report on all email notifications that have been sent from the system. This provides a full historical archive of who was notified about what, and when. The report details are grouped by Notification Type.</p> <p>A simple filter is provided when running this report to enable the user to easily select from:</p> <ul style="list-style-type: none"> • Notification Type • Date Range for Date Sent • From Company/Contact • To Company/Contact.
020	Session History Details	An audit report on selected user sessions within a defined date range.
025	BIC Report	<p>The “Ball in Court” report lists all outstanding actions by User including:</p> <ul style="list-style-type: none"> • Document Reviews (workflow module) • Document Release (workflow module) • Document Activation (workflow module) • Mail Review • Mail Reply • Transmittal Review • Packages to Release. <p>Overdue items are highlighted in red.</p>
100	Document Rules – Review Teams	A report on details of the Review Teams defined in the workflow module.
105	Logon Disclaimer Report	A report detailing which users agreed and which users did not agree to the disclaimer message shown at first logon.
110	Free Form Review Teams	A report listing the details of each Free Form Review Team defined for use with the workflow module.
210	User (List all Access)	A report listing the security group and access to InEight Document modules for each user. The report has the option to include a complete history of

Report No.	Title	Description
		changes to each user’s security settings with historical settings highlighted in grey.
220	User Active/Inactive History	An audit trail of all actions relating to the creation and updating of InEight Document users. The active column indicates whether the user is Active (yes) or Inactive (No).
230	Security Group Details	For each security group, lists the access settings for each mail type. The report has the option to include a complete history of changes to each security group settings with historical settings highlighted in grey.
240	TeamBinder Administrators Details	Lists the details of all Administrators on a particular project.
250	Distribution Rules	Allows you to quickly review the document distribution rules for your team.