

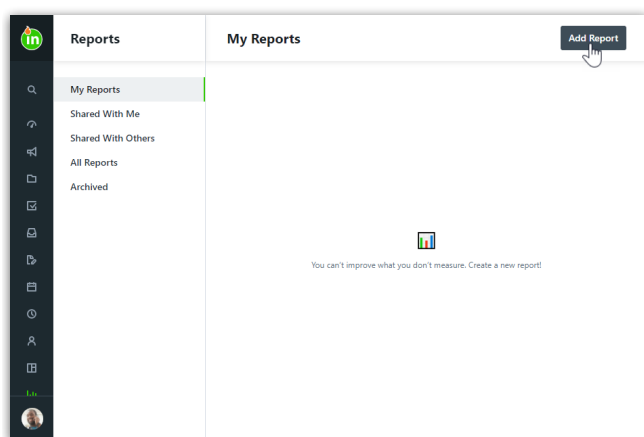
An Introduction to Reporting

Published on 10/19/2020

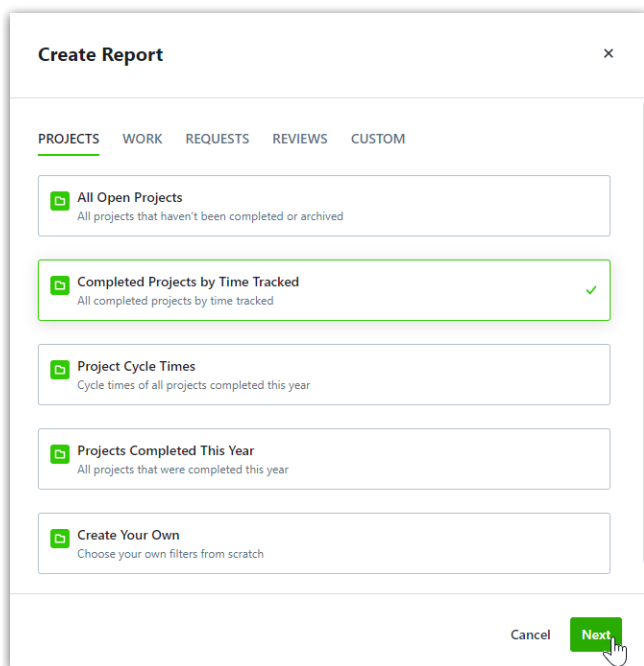
Reports provide insights into how your team is working within inMotion ignite, empowering you to manage current workloads effectively, understand how your team is tracking toward established goals, and make data-informed strategic decisions for the future. Reports are segmented to provide customized views of every level of work and are available for Campaigns, Projects, Tasks, Proofs, All Work, Requests, Reviews, Users, and Time. Each report can be customized with the columns and filters you need to see vital information at a glance.

Creating a Report

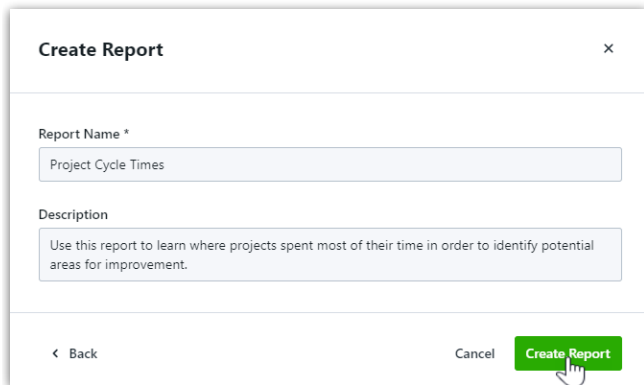
To create a new report, select **Reports** from the global navigation menu and click **Add Report**.



Our Quick Start Reporting experience gives you the option to select a templated report to assess and optimize your creative process. These templates are available for Projects, Work, Requests, and Reviews reports. To create a report from a template, select the template and click **Next**.

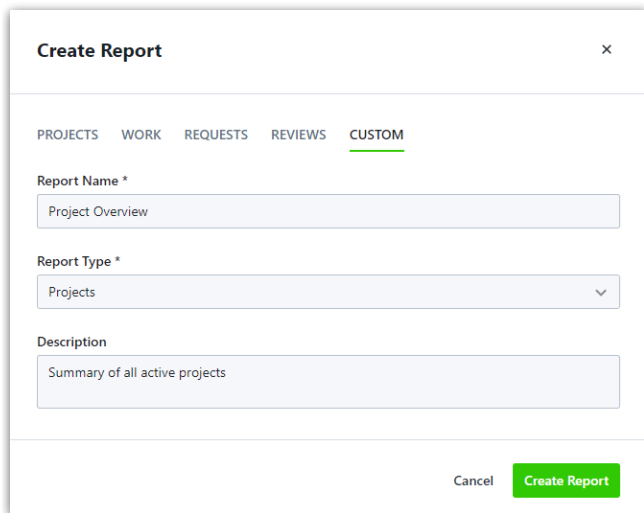


You have the option to change the name of the report and the description. Click **Create Report** to save and open the report.



The 'Create Report' dialog box has a title bar with a close button (X). It contains two text input fields: 'Report Name *' with the value 'Project Cycle Times' and 'Description' with the placeholder text 'Use this report to learn where projects spent most of their time in order to identify potential areas for improvement.' At the bottom, there are three buttons: a back arrow labeled 'Back', a 'Cancel' button, and a green 'Create Report' button with a hand cursor icon over it.

To create a report from scratch, select **CUSTOM**. Provide a report name, report type, and optional description. Click **Create Report** to save and open the report.



This 'Create Report' dialog box includes a tabbed interface at the top with tabs for 'PROJECTS', 'WORK', 'REQUESTS', 'REVIEWS', and 'CUSTOM' (which is selected and underlined). Below the tabs are three input fields: 'Report Name *' with 'Project Overview', 'Report Type *' with a dropdown menu showing 'Projects', and 'Description' with 'Summary of all active projects'. The bottom buttons are 'Cancel' and a green 'Create Report' button.



The report type will determine the columns and filters available in the report and cannot be changed after the initial setup. [Learn more](https://guide-ignite.inmotionnow.com/help/reporting-reference-guide) (https://guide-ignite.inmotionnow.com/help/reporting-reference-guide).

Customizing a Report

Columns

Each report includes the ability to select and deselect the desired data to include. Simply click **Columns** at the top of the report and choose what information should be added or removed.

Reports

My Reports
Shared With Me
Shared With Others
All Reports
Archived

Project Overview

Options

1-12 of 12

PROJECT NAME	TIME FROM REQUEST TO APPROVAL	TIME FROM APPROVAL TO FIRST PROOF	TIME IN "TO DO"
TrueSoap Fall Campaign	14m		
Sunflower Social Media Video	2m		
Social Media Video - Sunflower	0m		
Sunflower Digital Ads	0m		
TrueSoap Spring 2019 Campaign		15d 22h 46m	
Sunflower Campaign			
Clean House Marketing Launch			
Email Campaign - Fall			
TrueSoap Fall Campaign			

Columns

- Time from Approval to First Proof ✓
- Time from Request to Approval ✓
- Time in "Concepting" ✓
- Time in "Design" ✓
- Time in "In Review" ✓
- Time in "To Do" ✓
- Actual Cost
- Assigned Users
- Budget
- Comments

Filter by

To filter your report, select the name of the specific filter you would like to customize.

Reports

My Reports
Shared With Me
Shared With Others
All Reports
Archived

Project Overview

Options

Projects By Status

12 Projects

- Concepting
- In Review
- To Do

Date Project Status (4)

1-12 of 12

PROJECT NAME

TrueSoap Fall Campaign

Sunflower Social Media Video

2m

FROM APPROVAL TO FIRST PROOF

TIME IN "TO DO"

TIME IN "CONCEPTING"

TIME IN "TO DO"

Columns

Save to Report Clear

Add a filter

Assignees

Tags

From the **Filter By** menu, click on each value that you would like to include in your report, and select **Apply**.

Reports

My Reports
Shared With Me
Shared With Others
All Reports
Archived

Project Overview

Options

Projects

Projects By Status

12 Projects

- Concepting
- In Review
- To Do

Date Project Status (4)

1-12 of 12

PROJECT NAME

TrueSoap Fall Campaign

Sunflower Social Media Video

2m

FROM APPROVAL TO FIRST PROOF

TIME IN "TO DO"

TIME IN "CONCEPTING"

TIME IN "TO DO"

Columns

Save to Report Clear

Filter by Tag

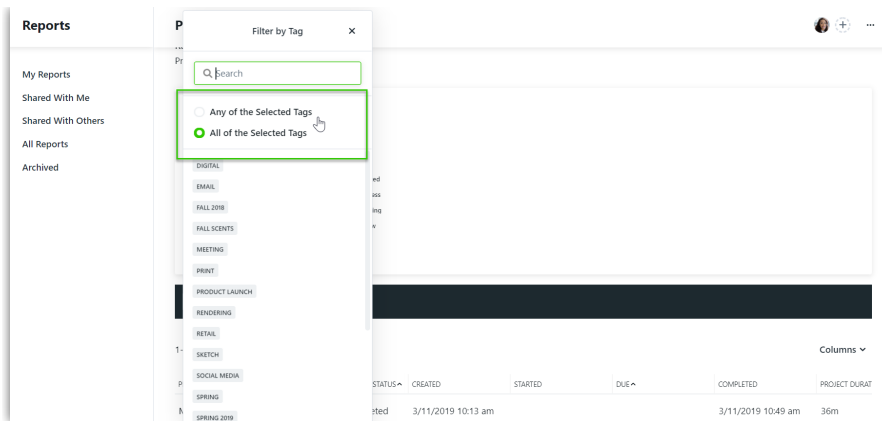
Search

- DIGITAL ✓
- EMAIL ✓
- FALL 2018 ✓
- FALL SCENARIOS
- MEETING
- PRINT
- PRODUCT LAUNCH
- RENDERING
- RETAIL
- SKETCH
- SOCIAL MEDIA

Clear

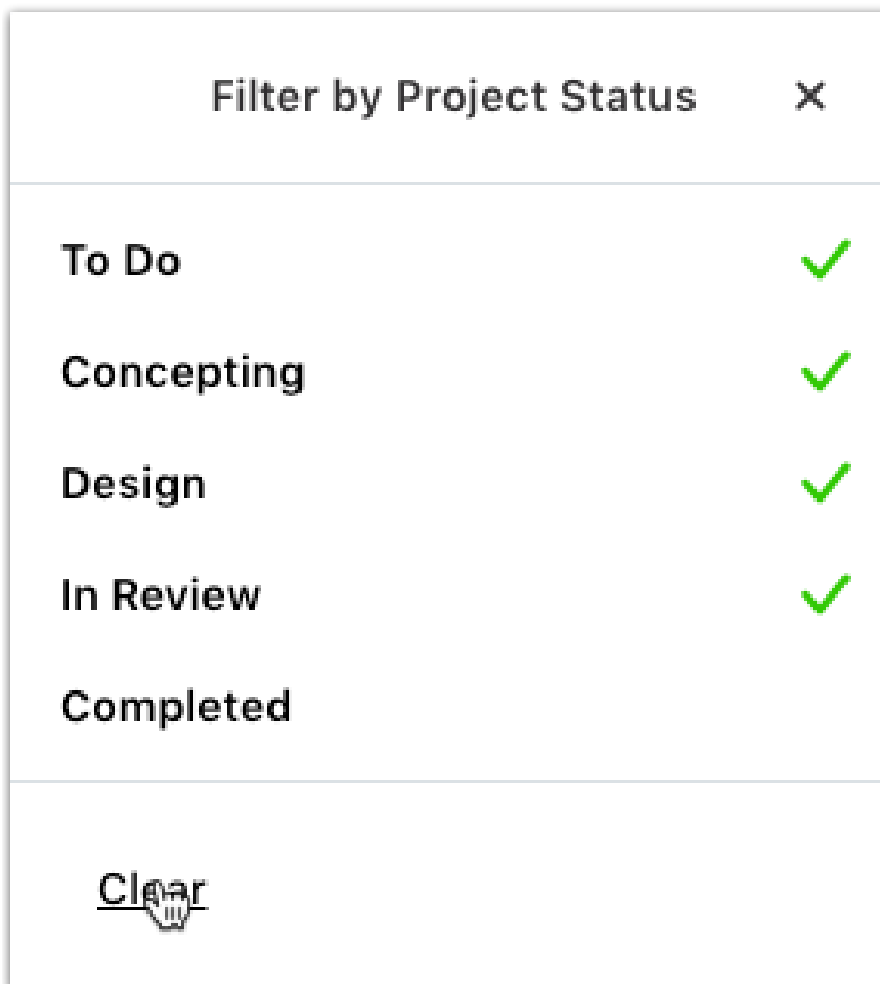
Apply

When filtering by tags, you have the option to select if the filter displays results that match *Any* or *All* of the selected criteria.

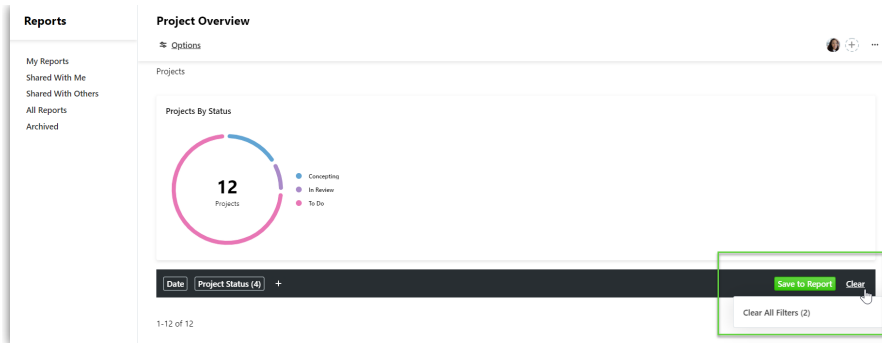


Selecting **Any of the Selected Tags** will include results with any one or multiple combination of the tags chosen. Selecting **All of the Selected Tags** will only include results with all tags chosen.

To clear an active filter, select the corresponding filter, click **Clear** in the bottom left of the **Filter By** menu, and then click **Apply**.



To clear all filters selected, simply select **Clear** in the black header bar and click **Clear All Filters**.

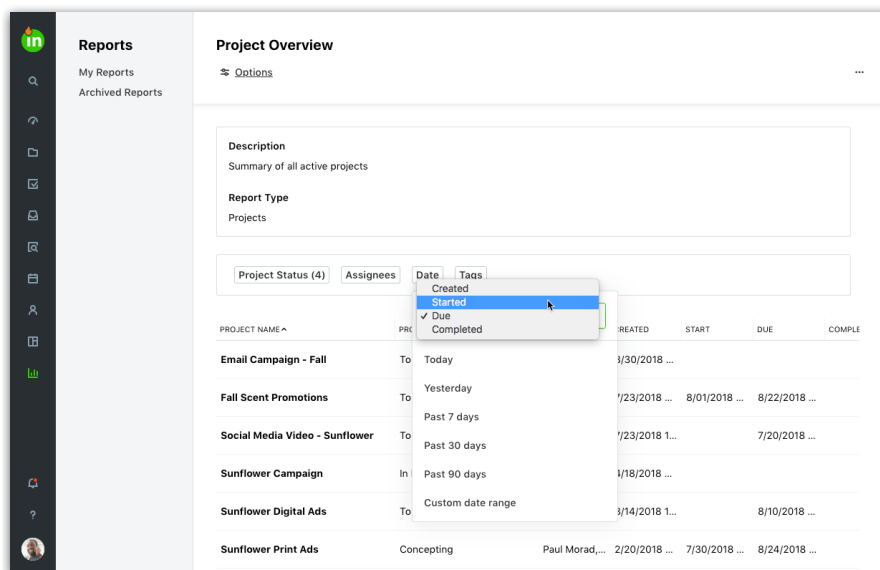


Once you've finished customizing your report, you can save these filters for future use. Click **Save to Report** to update your report. *Note: The **Save to Report** button will only appear when you apply changes to the report filtering that have not yet been saved.*

Filter by Date

The date filter is very flexible and allows you to specify unique date ranges for your report. To filter by date, select the **Date** option from the available filters.

From the top of the **Filter by Date** menu, click the drop down menu to choose an available date type. Depending on your report type, you may see varying types on which to build your specific time range such as Created, Started, Due, Completed, etc.



Next, select one of the default time ranges, or choose **Custom date range** to build your own.

Started

Today

Yesterday

Past 7 days

Past 30 days

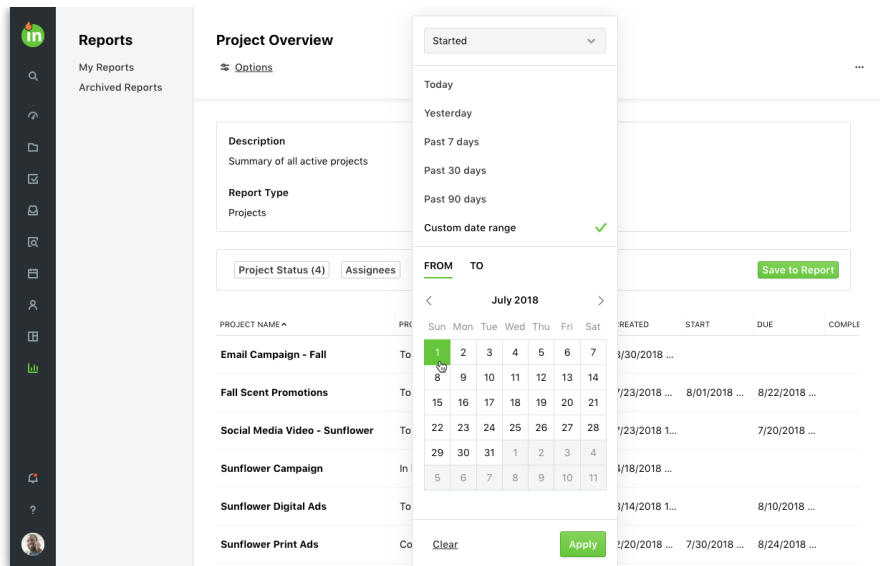
Past 90 days

Custom date range

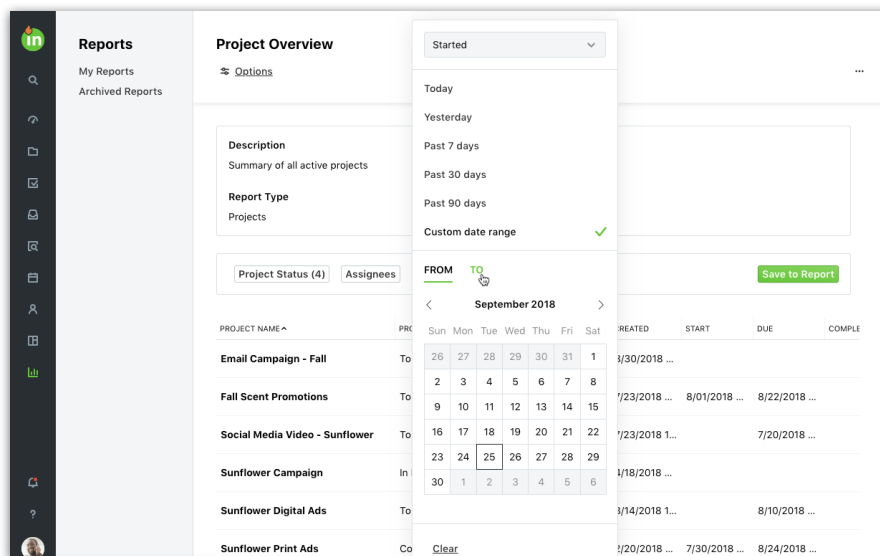
Custom Date Ranges

Custom date ranges can be set up in three different ways:

- **From** - Includes any applicable date that starts on or after the selected date, i.e. 'Started after Jul 1, 2018.'
 - To establish a **From** date filter, select **Custom date range** and the **From** calendar will show by default. Using the calendar, select the relevant date for filtering and click **Apply**.



- **To** - Includes any applicable date that falls before or on the selected date, i.e. **'Started before Sep 30, 2018.'**
 - To establish a **To** date filter, select **Custom date range**. Choose the **TO** calendar, select the relevant date for filtering, and click **Apply**.



- **Date Range** - Includes any applicable date that falls between the **From** and **To** selected dates, i.e. **'Started Jul 1, 2018 - Sep 30, 2018.'**
 - To establish a **Date Range** filter, select **Custom date range** and the **From** calendar will show by default. Using the calendar, select the relevant date for the beginning of your date range. Next, click the **TO** calendar, select the relevant date for the end of your date range, and click **Apply**.

in

Reports

My Reports

Archived Reports

Project Overview

Options

Description

Summary of all active projects

Report Type

Projects

Project Status (4)

Assignees

Started Jul 1, 2018 - Sep 30, 2018

Tags

Save to Report

PROJECT NAME ^	PROJECT STAT...	PROJECT DES...	ASSIGNED USE...	CREATED	START	DUE	COMPLETI
Fall Scent Promotions	To Do		Greg Dixon,...	7/23/2018 ...	8/01/2018 ...	8/22/2018 ...	
Sunflower Print Ads	Concepting		Paul Morad,...	2/20/2018 ...	7/30/2018 ...	8/24/2018 ...	
Sunflower Retail Signage	Concepting		Megan Diaz...	6/20/2018 ...	7/23/2018 ...	9/15/2018 ...	
Sunflower Social Media Video	To Do			6/20/2018 ...	7/09/2018 ...	7/13/2018 5...	

1-4 of 4

< 1 >

20 per page

Sort

To sort your report results, you can click any column header to sort by that field. Click a second time to reverse the order from ascending to descending. After establishing your initial sort parameters, you can sort by additional columns by holding down shift and clicking one or more column headers.

in

Reports

My Reports

Archived Reports

Project Overview

Options

Description

Summary of all active projects

Report Type

Projects

Project Status (4)

Assignees

Started Jul 1, 2018 - Sep 30, 2018

Tags

Save to Report

PROJECT NAME	PROJECT STAT...	PROJECT DESCRIPTION	ASSIGNED USERS	CREATED	START	DUE ^	COMPLETI
Sunflower Social Media Video	To Do			6/20/2018 ...	7/09/2018 ...	7/13/2018 5...	
Fall Scent Promotions	To Do		Greg Dixon, Gw...	7/23/2018 ...	8/01/2018 ...	8/22/2018 ...	
Sunflower Print Ads	Concepting		Paul Morad, Gra...	2/20/2018 ...	7/30/2018 ...	8/24/2018 ...	
Sunflower Retail Signage	Concepting		Megan Diaz, G...	6/20/2018 ...	7/23/2018 ...	9/15/2018 ...	

1-4 of 4

< 1 >

20 per page

View

In any report, you can resize individual column widths. Simply position your cursor between two columns and drag to resize.

in

Reports

My Reports

Archived Reports

Project Overview

Options

Description

Summary of all active projects

Report Type

Projects

Project Status (4)

Assignees

Date

Tags

Save to Report

PROJECT NAME	PROJECT ST...	PROJECT DES...	ASSIGNED USE...	CREATED	START	DUE	COMPLETE
Sunflower Print Ads	Concepting		Paul Morad,...	2/20/2018 ...	7/30/2018 ...	8/24/2018 ...	
Sunflower Retail Signage	Concepting		Megan Diaz,...	6/20/2018 ...	7/23/2018 ...	9/15/2018 ...	
Sunflower Campaign	In Review		Paul Morad,...	4/18/2018 ...			
Email Campaign - Fall	To Do	Fall scents ...		8/30/2018 ...			
Sunflower Social Media Video	To Do			6/20/2018 ...	7/09/2018 ...	7/13/2018 5...	
Social Media Video - Sunflower	To Do			7/23/2018 1...		7/20/2018 ...	

You can also customize how many results show per page by scrolling to the bottom right of your report and click on the pagination menu. You can choose from 20, 50, or 100 results per page.

in

Reports

My Reports

Shared With Me

Shared With Others

All Reports

Archived

Project Overview

+

...

PROJECT NAME	PROJECT ST...	PROJECT DES...	ASSIGNED USE...	CREATED	START	DUE	COMPLETE
Fall Scents Digital Ads	In Progress			10/30/2019 11:44 am		11/15/2019	
Fall Scents Print Ad	Completed			10/30/2019 11:54 am	10/08/2019	11/08/2019	11/07/2019 3
Fall Scents Video for Social	Concepting			10/30/2019 11:44 am		11/25/2019	
Print Ad- Winter Scents	To Do			12/03/2019 11:48 am			
Shopping Cart Abandonment email c...	In Progress			10/31/2019 10:04 am		11/22/2019	
Shopping Cart Abandonment retarge...	In Progress			10/31/2019 10:05 am		11/22/2019	
Sunflower Print Ad- Full Page	Completed			8/09/2019 1:15 pm		8/30/2019	8/09/2019 2
Sunflower Social Media Video	In Progress			6/17/2019 12:05 pm	10/28/2019	11/29/2019	
Winter Scents print ad	In Progress			8/16/2019 10:28 am			
Winter Scents Print Ad	To Do			12/02/2019 11:51 am	1/10/2020		

20 per page

50 per page

100 per page

1-11 of 11

< 1 >

20 per page

Exporting a Report

If you would like to view or manipulate your report data outside of inMotion, the system will allow you to export your data to a .CSV file. Click on the actions menu in the top right of the report and select **Export** to prepare the report for download.

in

Reports

My Reports

Archived Reports

Project Overview

Options

Description

Summary of all active projects

Report Type

Projects

Project Status (4)

Assignees

Started Jul 1, 2018 - Sep 30, 2018

Tags

Save to Report

PROJECT NAME	PROJECT ST...	PROJECT DES...	ASSIGNED USE...	CREATED	START	DUE	COMPLETED
Sunflower Print Ads	Concepting		Paul Morad,...	2/20/2018 ...	7/30/2018 ...	8/24/2018 ...	
Sunflower Retail Signage	Concepting		Megan Diaz,...	6/20/2018 ...	7/23/2018 ...	9/15/2018 ...	
Sunflower Social Media Video	To Do			6/20/2018 ...	7/09/2018 ...	7/13/2018 5...	
Fall Scent Promotions	To Do		Greg Dixon,...	7/23/2018 ...	8/01/2018 ...	8/22/2018 ...	

1-4 of 4

< 1 >

20 per page

Delete

Export

Archive

You will receive a banner alert when the .CSV file is ready for download.

Project Overview

Project Status Stage (2)

Archived Status: Not Archived

Clear

1-4 of 4

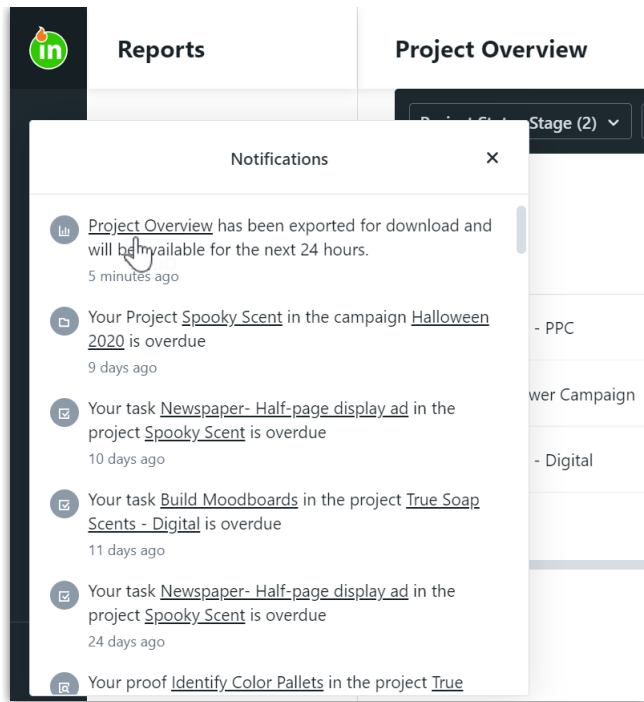
Columns

PROJECT NAME	PROJECT STATUS	START DATE	DUE DATE	MEMBERS	TAGS
True Soap Scents - PPC	In Progress			Paul Morad, Caleb Eisen...	
True Soap Sunflower Campaign	To Do		5/29/2020		SUNFLOWE
True Soap Scents - Digital	In Progress	4/01/2020	9/04/2020	Christy Drucker, Grace D...	FALL SCEN
Spooky Scent	To Do	10/01/2020	10/14/2020	Christy Drucker, Grace D...	

1-4 of 4

Project Overview has been exported for download and will be available for the next 24 hours.

Navigate to your in-app notifications and click on the the report to download.

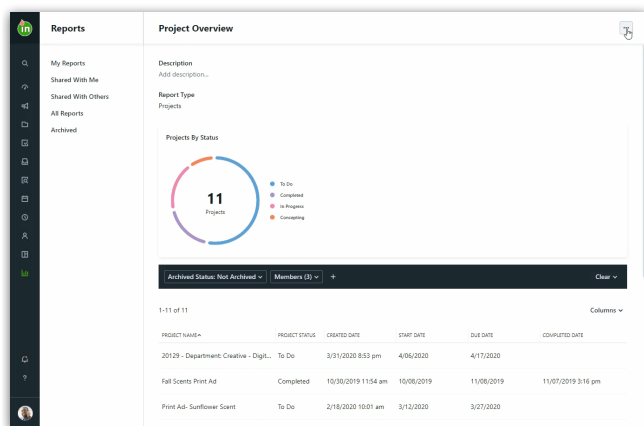


You may need to reformat cells as GENERAL rather than TEXT if you want to run formulas.

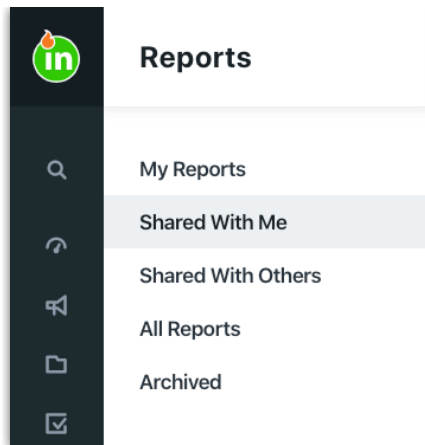
Sharing a Report

Report Sharing is only available for Business and Enterprise customers.

You can share a report you've built with other users in your account by clicking the actions menu at the top right of the report view, then selecting the user(s) you'd like to have access to your report.



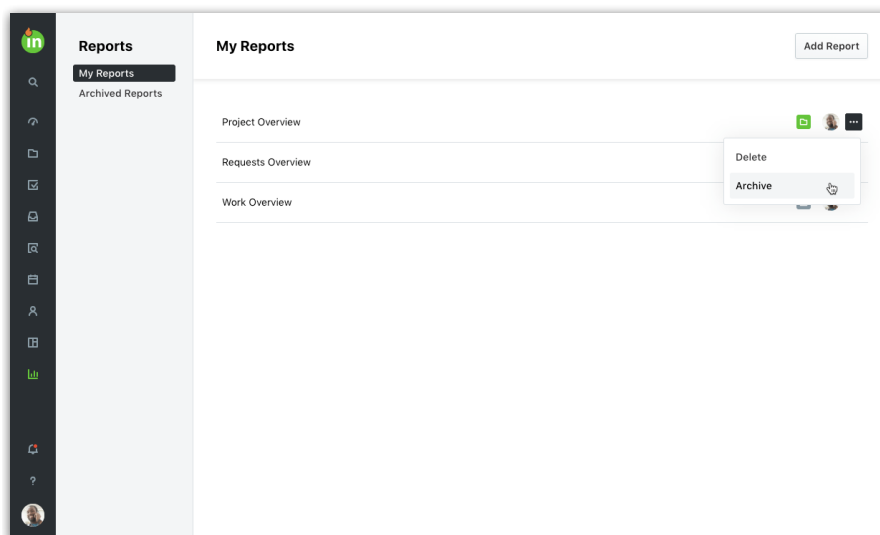
Those users will now be able to view that report from the **'Shared With Me'** view under **Reports**.



Managing Reports

To delete or archive a report, click on the actions menu in the top right of the report. Select the desired action to proceed.

You can also delete or archive a report from the Reports list view by selecting the action menu to the right of an individual report slat.



Archived reports will be available from the **Archived Reports** sub-navigation. You can unarchive a report at any time using the same actions menu.