

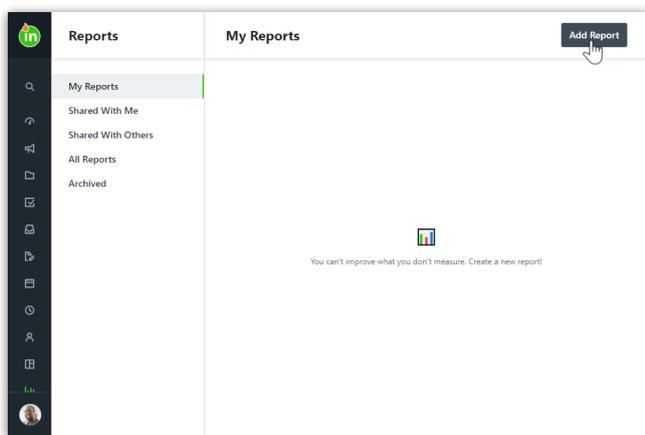
An Introduction to Reporting

Published on 01/27/2022

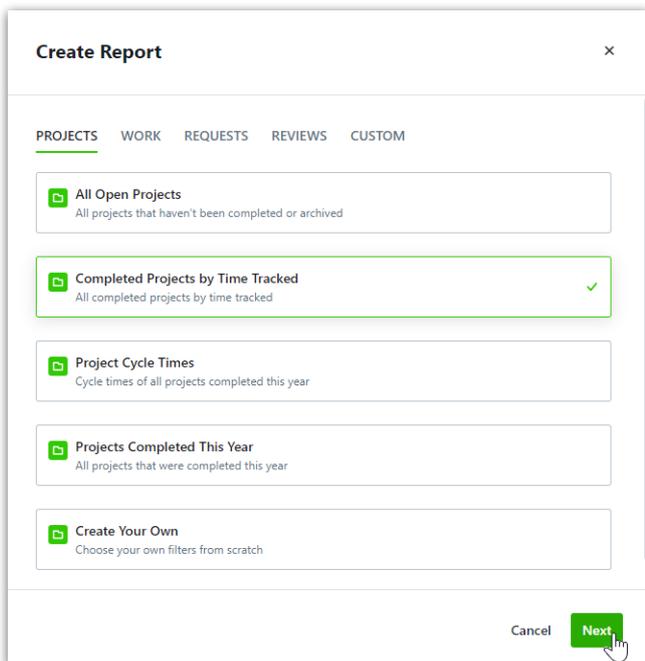
Reports provide insights into how your team is working within inMotion ignite, empowering you to manage current workloads effectively, understand how your team is tracking toward established goals, and make data-informed strategic decisions for the future. Reports are segmented to provide customized 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

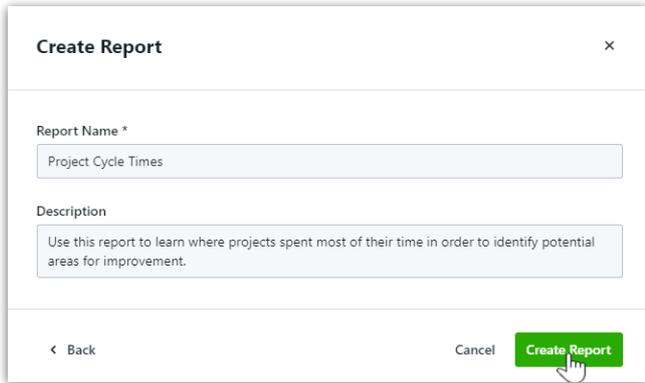
To create a new report, select **Reports** from the global navigation menu and click **Add Report**.



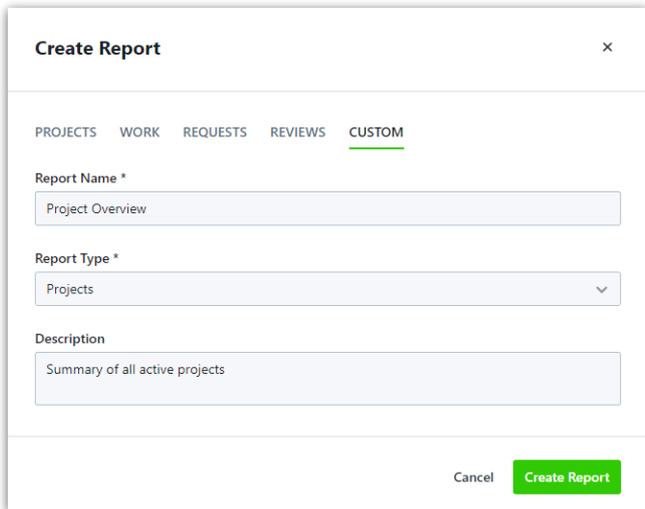
Our Quick Start Reporting experience gives you the option to select a templated report to assess and optimize your creative process. These templates are available for Projects, Work, Requests, and Reviews reports. To create a report from a template, select the template and click **Next**.



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



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.

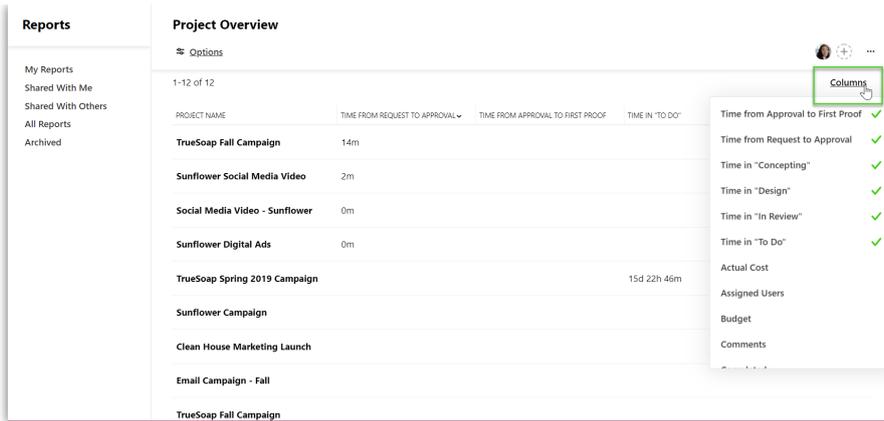


The report type will determine the columns and filters available in the report and cannot be changed after the initial setup. [Learn more](https://guide-ignite.inmotionnow.com/help/reporting-reference-guide) (https://guide-ignite.inmotionnow.com/help/reporting-reference-guide).

Customizing a Report

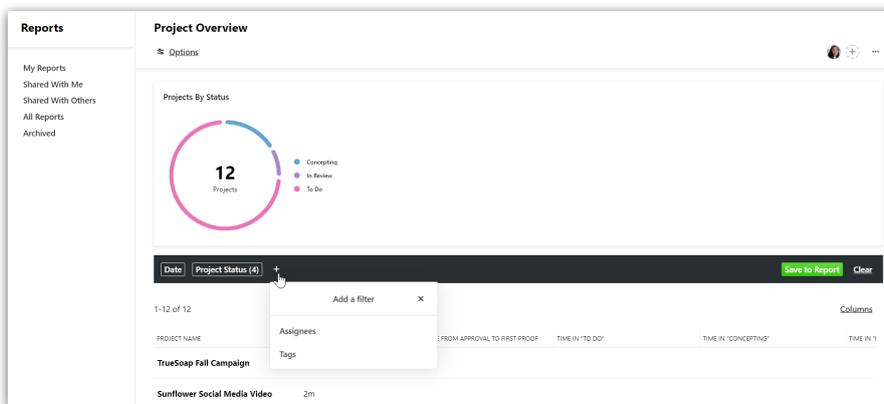
Columns

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.

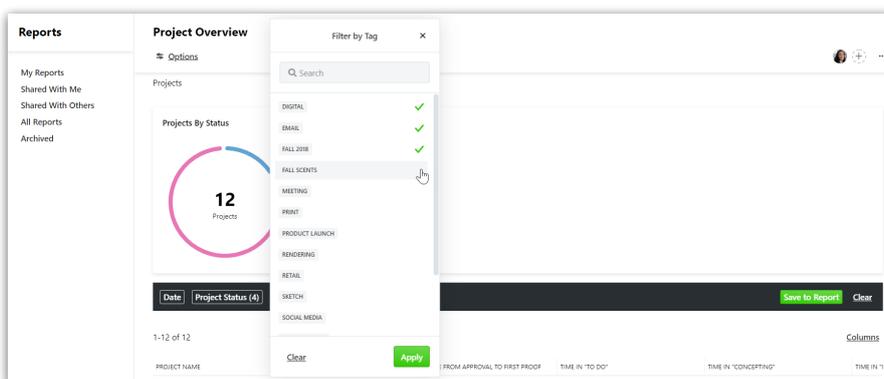


Filter by

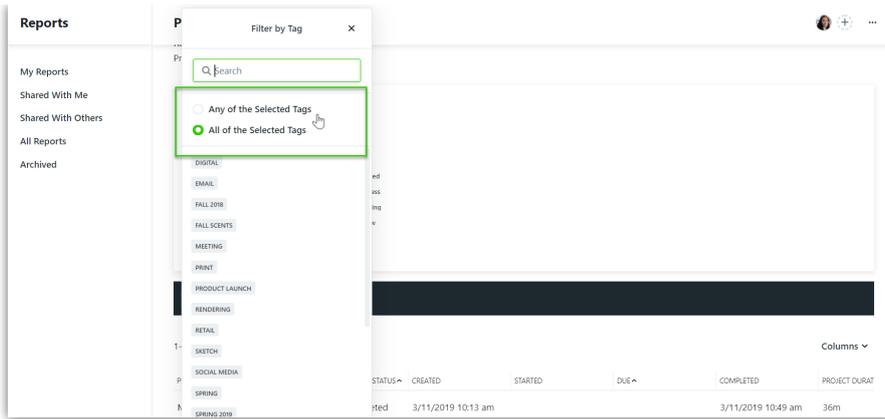
To filter your report, select the name of the specific filter you would like to customize.



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

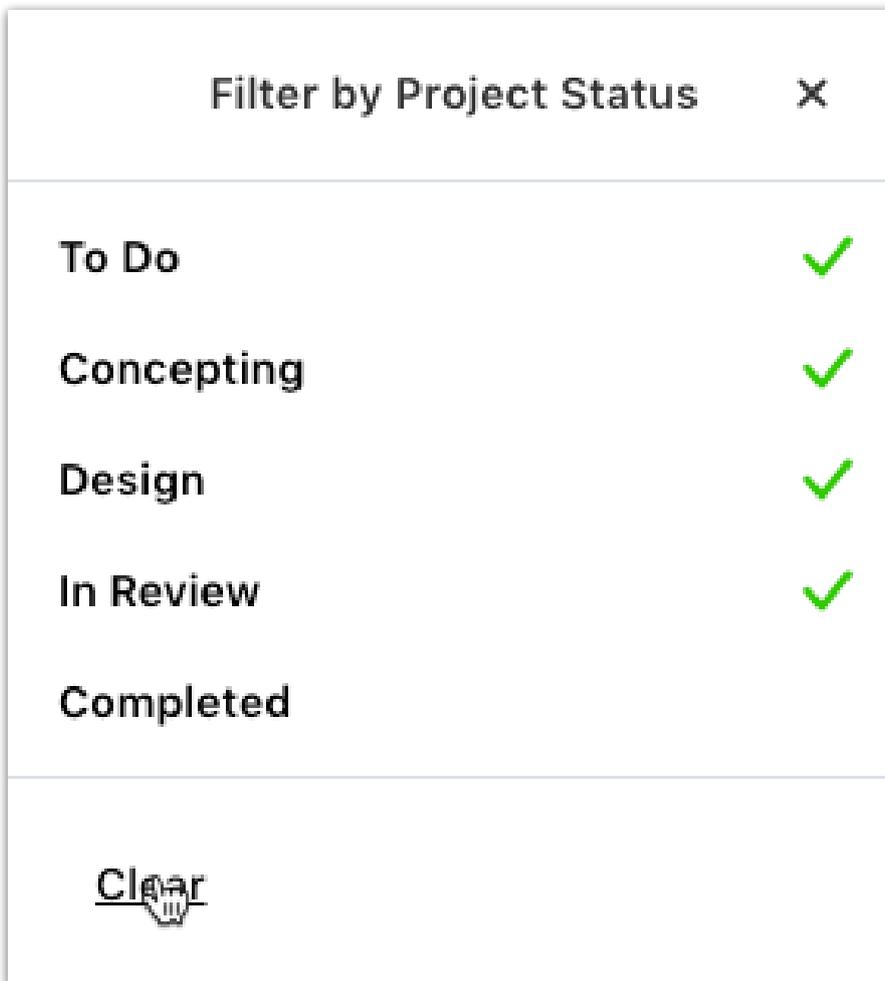


When filtering by tags, you have the option to select if the filter displays results that match *Any* or *All* of the selected criteria.

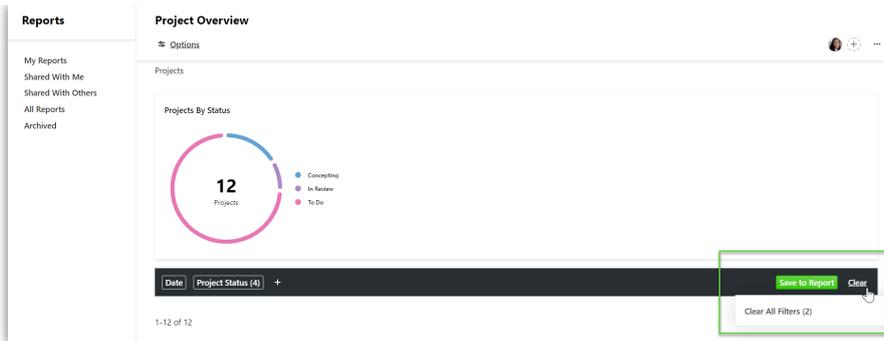


Selecting **Any of the Selected Tags** will include results with any one or multiple combination of the tags chosen. Selecting **All of the Selected Tags** will only include results with all tags chosen.

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**.

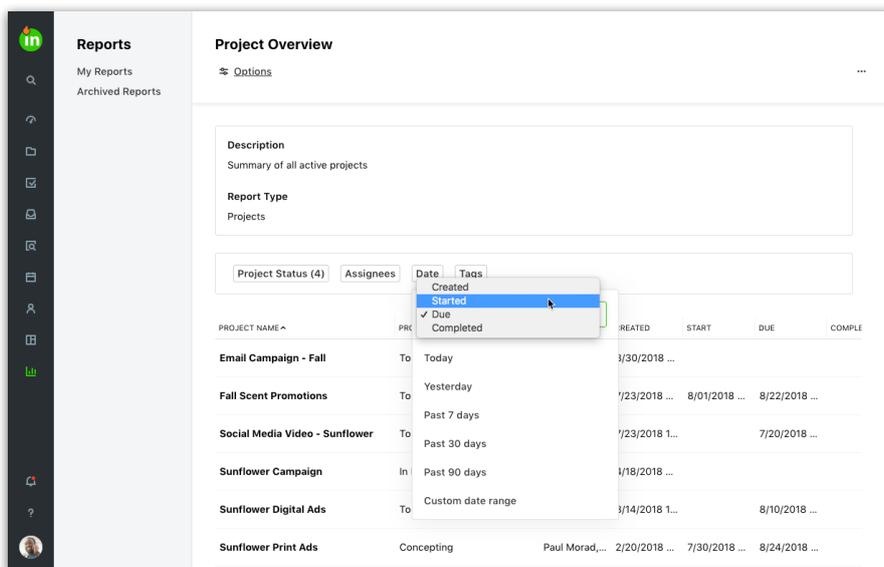


Once you've finished customizing your report, you can save these filters for future use. Click **Save to Report** to update your report. *Note: The **Save to Report** button will only appear when you apply changes to the report filtering that have not yet been saved.*

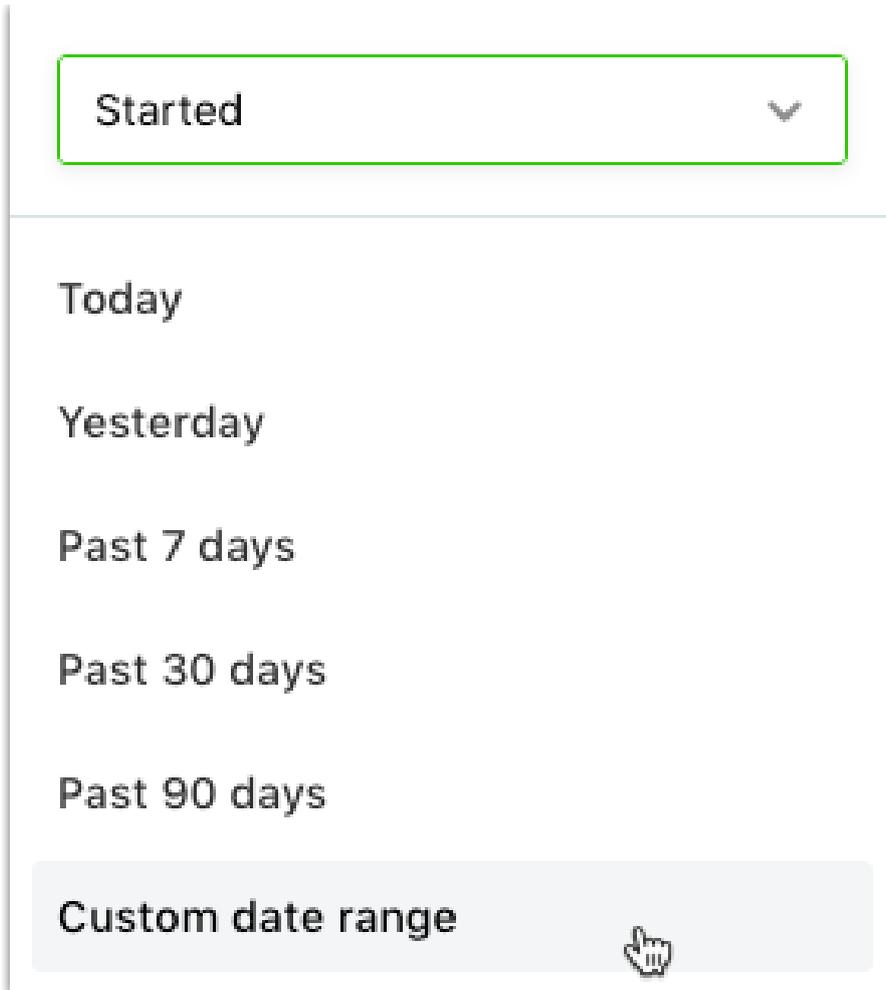
Filter by Date

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.



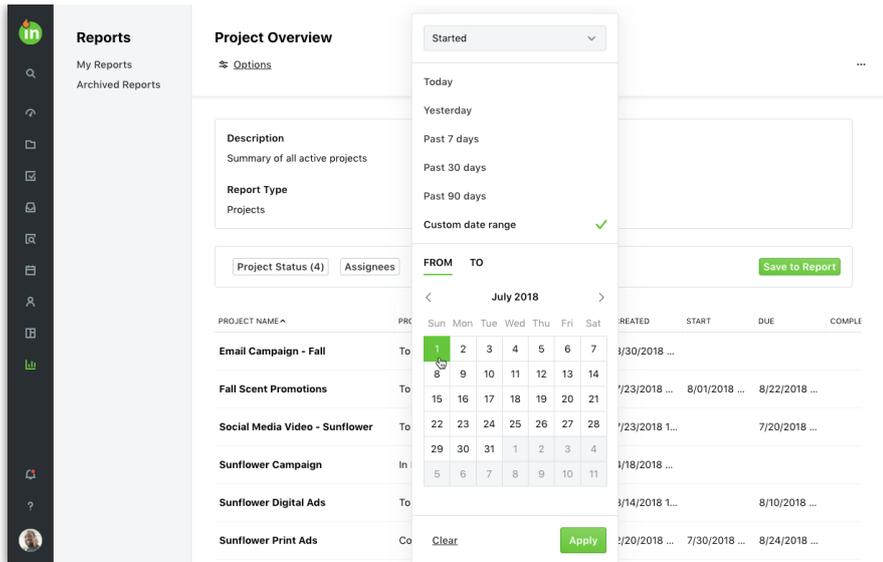
Next, select one of the default time ranges, or choose **Custom date range** to build your own.



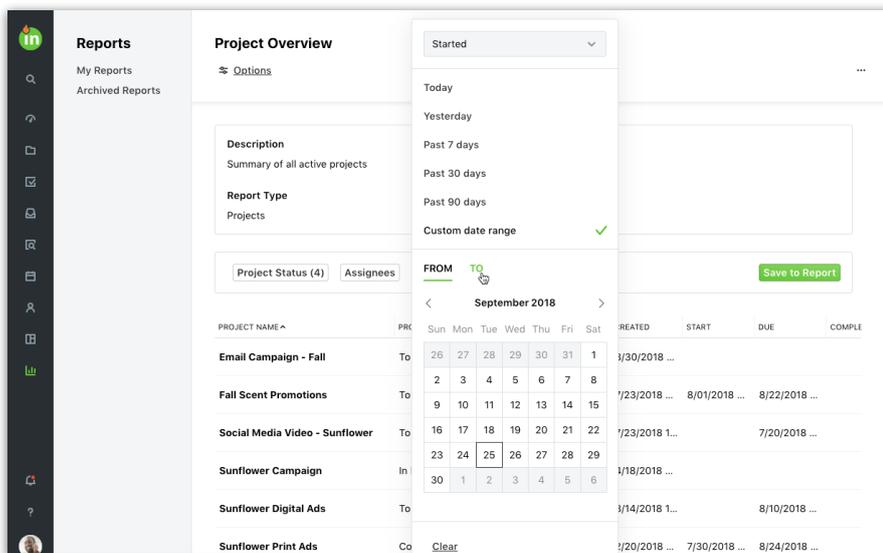
Custom Date Ranges

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**.

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.

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.

Project Overview

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.

Project Overview

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 5...
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		

1-11 of 11 < 1 > 20 per page

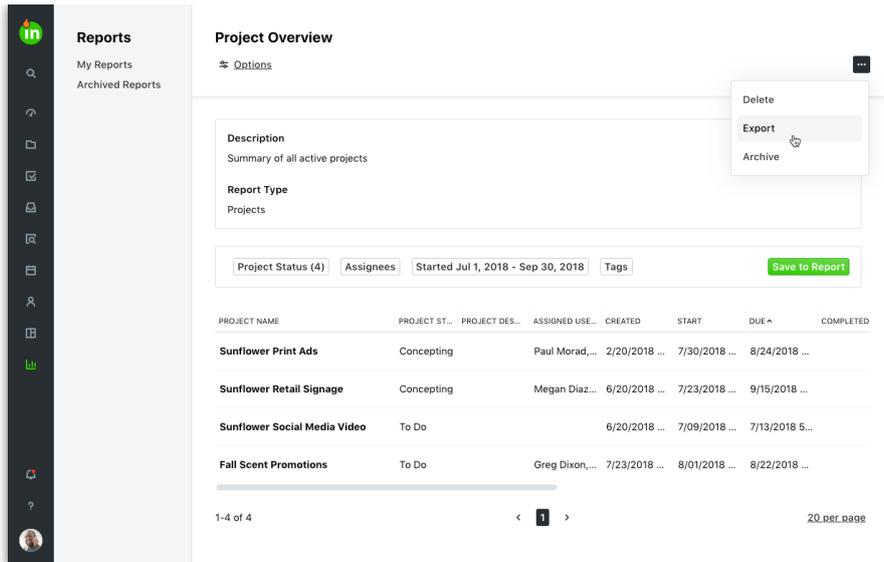
20 per page ✓

50 per page

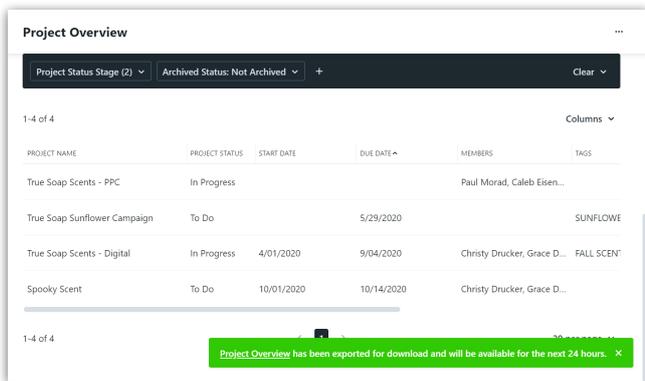
100 per page

Exporting a Report

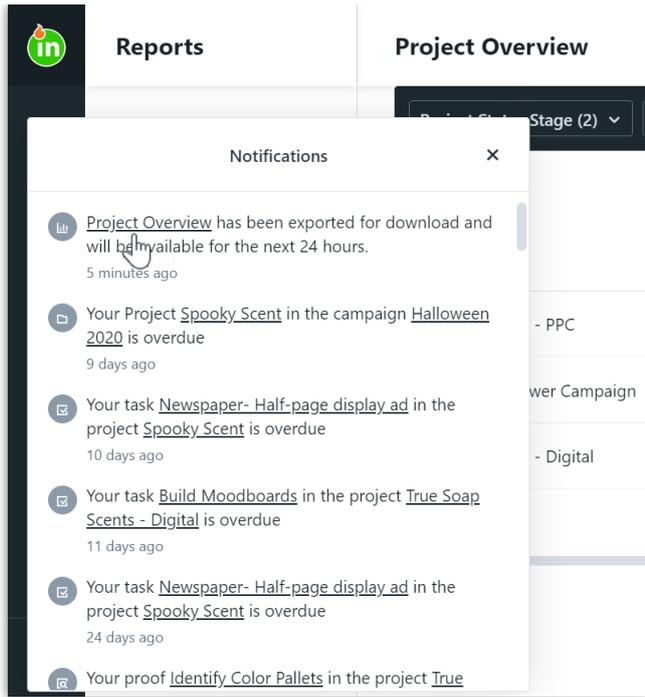
If you would like to view or manipulate your report data outside of inMotion, the system will allow you to export your data to a .CSV file. Click on the actions menu in the top right of the report and select **Export** to prepare the report for download.



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



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

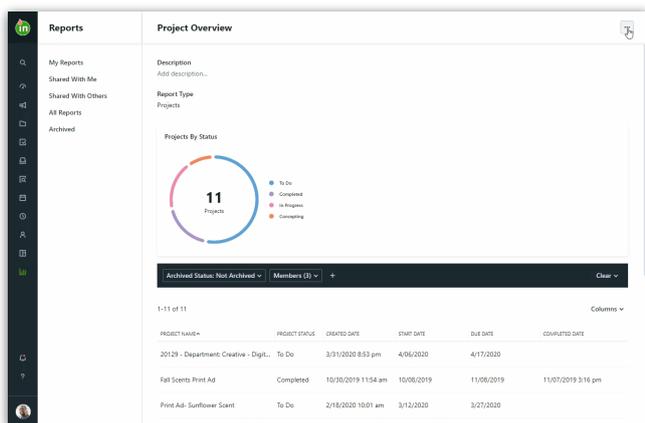


You may need to reformat cells as GENERAL rather than TEXT if you want to run formulas.

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.



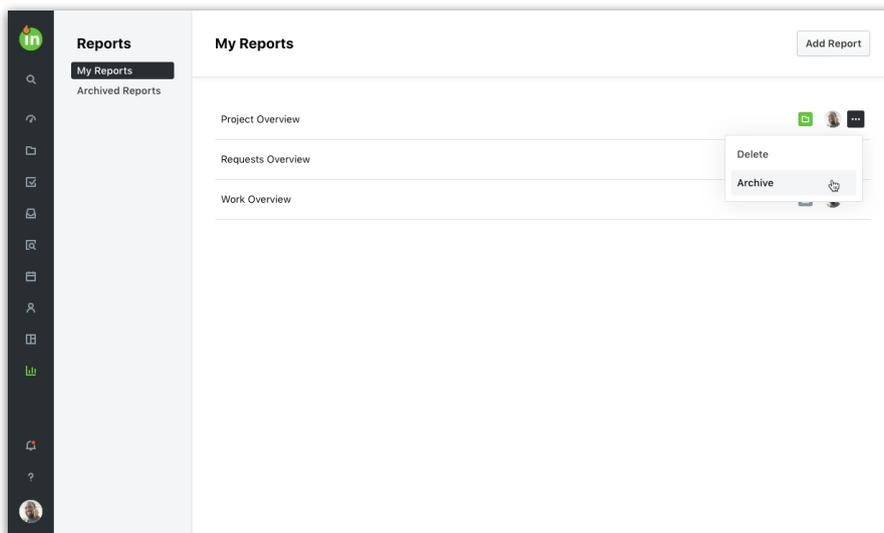
Those users will now be able to view that report from the **"Shared With Me"** view under **Reports**.



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.