



intelligence Cheat Sheet: Reports

Intelligence writes bespoke reports suited to your specific requirements. Contact us to get started.

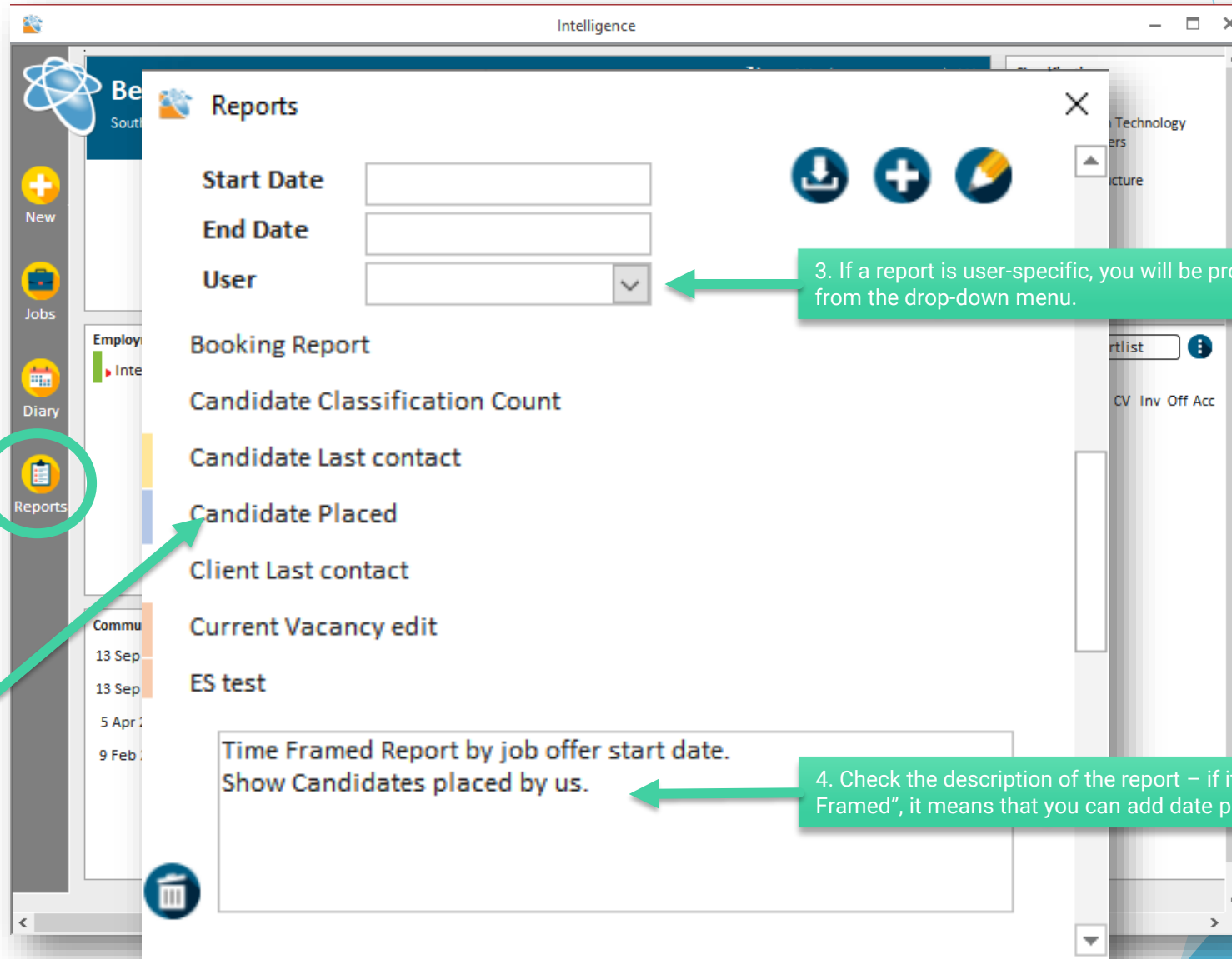
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Reports



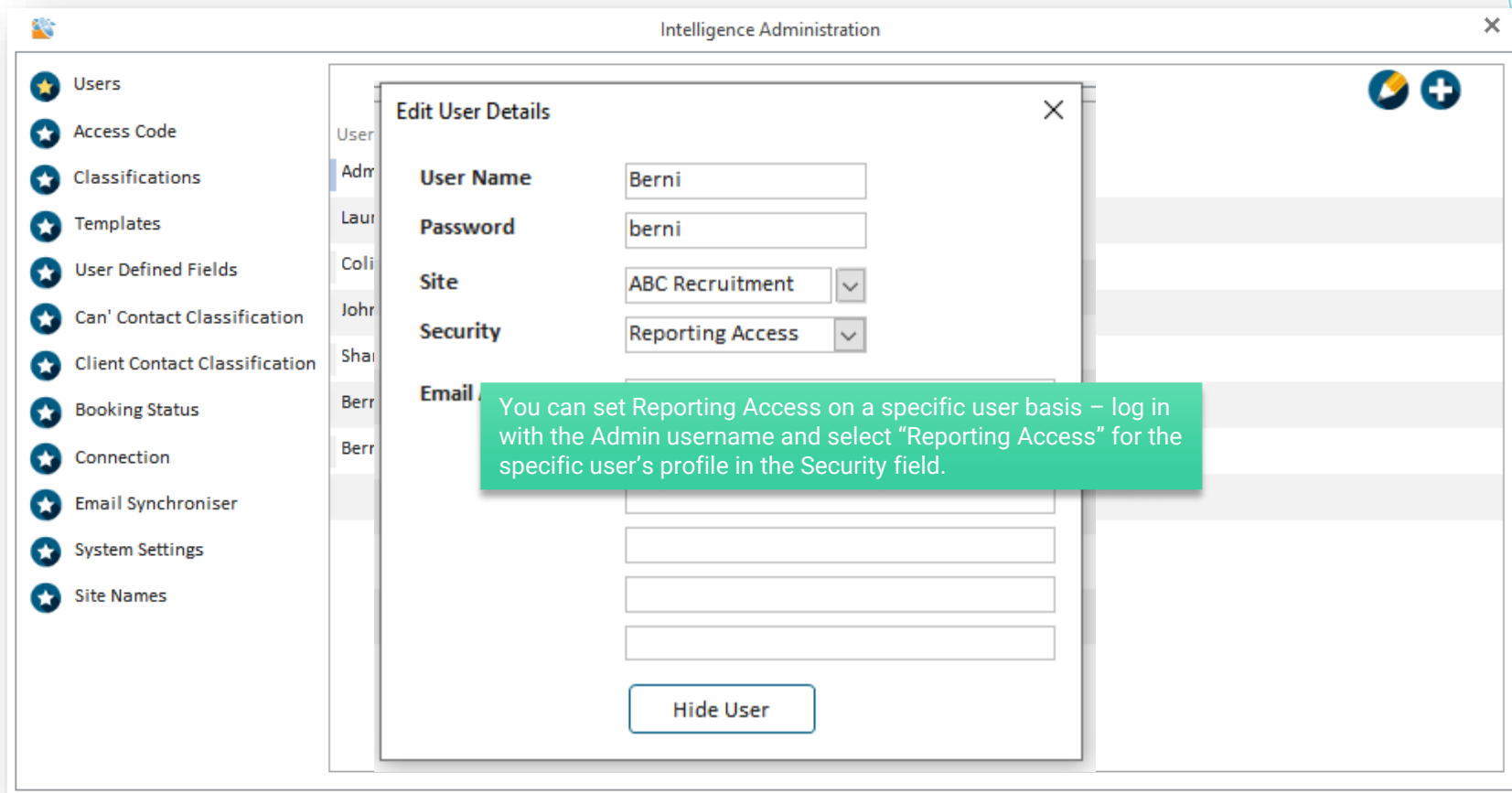
1. Click on the Reports icon on the left-hand vertical menu to open the Reports module.

2. Select the report you want to run, and click on the Download button to export to Excel.

3. If a report is user-specific, you will be prompted to select a username from the drop-down menu.

4. Check the description of the report – if it says "Date framed" or "Time Framed", it means that you can add date parameters to your report.

Reporting Access



The screenshot displays the 'Intelligence Administration' window. On the left, a sidebar lists various system settings, including 'Users', 'Access Code', 'Classifications', 'Templates', 'User Defined Fields', 'Can' Contact Classification', 'Client Contact Classification', 'Booking Status', 'Connection', 'Email Synchroniser', 'System Settings', and 'Site Names'. The 'Users' section is selected, and a list of users is visible, including 'Adm', 'Laur', 'Coli', 'Johr', 'Sha', 'Berr', and 'Berr'. The 'Edit User Details' dialog box is open, showing the following fields:

- User Name:** Berni
- Password:** berni
- Site:** ABC Recruitment
- Security:** Reporting Access
- Email:** (multiple empty input fields)

A green callout box highlights the 'Security' field with the text: "You can set Reporting Access on a specific user basis – log in with the Admin username and select 'Reporting Access' for the specific user's profile in the Security field." A 'Hide User' button is located at the bottom of the dialog box.