Custom Reports

An organization may need to generate custom reports for many purposes varying from internal research to special reports for customers. Docsvault allows users to develop custom reports like pending invoices, region wise projects, new contracts by customer, agreements expiring this year and so on. These reports are created in real time based on many different criteria including document profile indexes and allow organizations to gain intelligence from reports in no time.

Creating custom reports is quite easy using a simple wizard interface and is available to all users of Docsvault. Every user can create his or her own report as per their needs and make it publicly available or keep them private. Reports can be run with a single click and can be printed out or exported out in various file formats like PDF, xls, xlsx, etc.

Highlights

- ✓ Easy three step wizard to guide you in creating reports
- ✓ Reports are generated based on index values, created or modified dates, location, size, document status, author, document notes, etc.
- ✓ Create categories to organize reports into different groups
- ✓ You can control visibility of reports by making it Public or Private
- ✓ You can customize layout, size, orientation and colors
- ✓ You can save and email reports in various formats like PDF, Excel, CSV, etc.

Solutions

- *Better Decision-making*

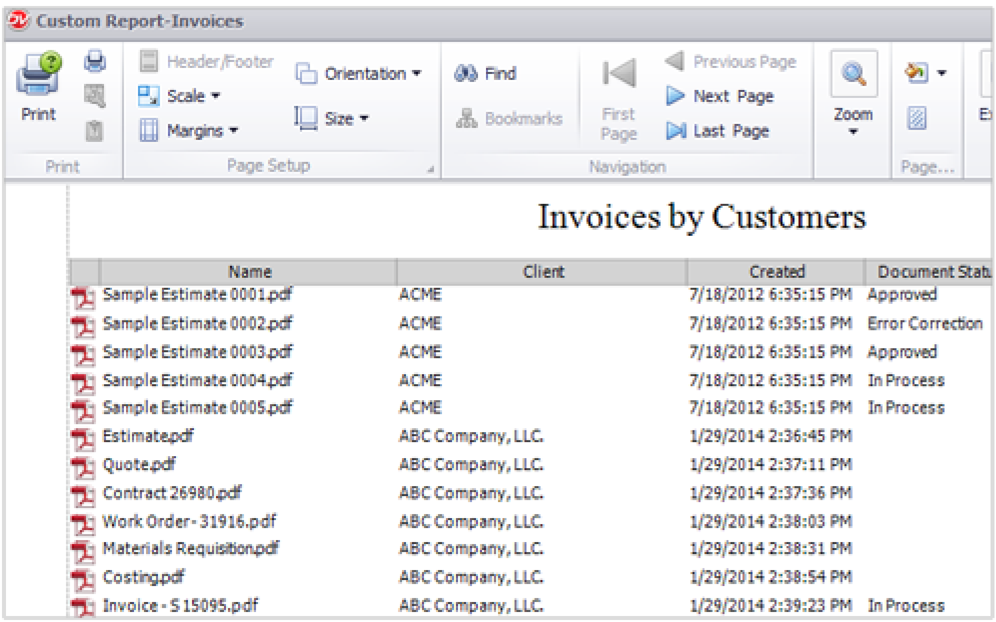
Custom reports allow you to gather information instantly for accurate and timely analysis and thus reach decisions faster.

- *Project Management*

As reports are generated in a snap, managers and team members have complete visibility of various progress indicators thus ensuring faster execution times.

What It Means For You?

Say you need all invoices and their statuses for a particular customer for the last month or year or any other time frame. Traditionally, you would inspect all the invoices for that customer one by one and gather data. Docsvault Custom reports could do this for you in minutes. Once designed reports can be run in real time on demand without any further configurations. The best part it is done in three simple steps, so everyone can create the most accurate and up-to-date reports within no time.



Invoices by Customers

Name	Client	Created	Document Statu
Sample Estimate 0001.pdf	ACME	7/18/2012 6:35:15 PM	Approved
Sample Estimate 0002.pdf	ACME	7/18/2012 6:35:15 PM	Error Correction
Sample Estimate 0003.pdf	ACME	7/18/2012 6:35:15 PM	Approved
Sample Estimate 0004.pdf	ACME	7/18/2012 6:35:15 PM	In Process
Sample Estimate 0005.pdf	ACME	7/18/2012 6:35:15 PM	In Process
Estimate.pdf	ABC Company, LLC.	1/29/2014 2:36:45 PM	
Quote.pdf	ABC Company, LLC.	1/29/2014 2:37:11 PM	
Contract 26980.pdf	ABC Company, LLC.	1/29/2014 2:37:36 PM	
Work Order - 31916.pdf	ABC Company, LLC.	1/29/2014 2:38:03 PM	
Materials Requisition.pdf	ABC Company, LLC.	1/29/2014 2:38:31 PM	
Costing.pdf	ABC Company, LLC.	1/29/2014 2:38:54 PM	
Invoice - S 15095.pdf	ABC Company, LLC.	1/29/2014 2:39:23 PM	In Process

Fast Facts

1. Every user in the system can create their own reports
2. Reports can be kept private or shared with everyone in the system