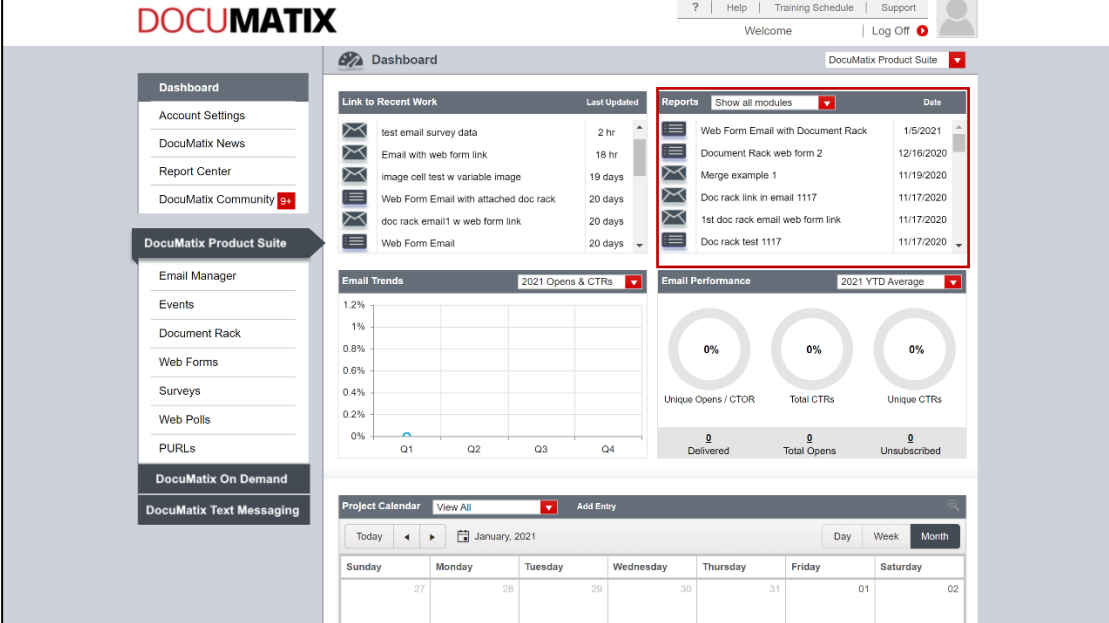


MARQUIS

| DMX 360 | How to Access Reports from the Dashboard | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|--|-----------------------------------|------------------|------------|------------------|------|------------------------|------|-----------------------------------|--|----------|--------------------------|-------|--------------------------|--|------------|----------------------------------|---------|-----------------|--|------------|---------------------------------------|---------|-----------------------------|--|------------|---------------------------------|---------|----------------------------------|--|------------|----------------|---------|--------------------|--|------------|
| | Use this procedure document to learn how to access DocuMatix reports from the Dashboard. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Order of Steps | Tasks | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Note: Reports are accessible for any published project, or by or utilizing the reports widget within the Dashboard. For information on how to access Reports within DocuMatix product suite, use DMX # 320: How to Access Reports from DPS. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Step 1 | Log into DocuMatix. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Step 2 | Click Dashboard from the left-hand side menu. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Note: For this example, we have selected Surveys Report. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Step 3 | Locate the Reports widget in the upper right corner. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| |  <p>The screenshot shows the DocuMatix Dashboard interface. On the left is a navigation menu with categories: Dashboard, Account Settings, DocuMatix News, Report Center, DocuMatix Community, DocuMatix Product Suite, Email Manager, Events, Document Rack, Web Forms, Surveys, Web Polls, PURLs, DocuMatix On Demand, and DocuMatix Text Messaging. The main dashboard area includes a 'Link to Recent Work' table, an 'Email Trends' chart for 2021 Opens & CTRs, an 'Email Performance' section with three gauges (Unique Opens / CTOR, Total CTRs, Unique CTRs) all showing 0%, and a 'Project Calendar' for January 2021. A 'Reports' widget in the upper right corner is highlighted with a red border, showing a list of reports with a dropdown menu open over the 'Date' column.</p> <table border="1" data-bbox="662 766 1292 940"> <thead> <tr> <th>Link to Recent Work</th> <th>Last Updated</th> <th>Reports</th> <th>Show all modules</th> <th>Date</th> </tr> </thead> <tbody> <tr> <td>test email survey data</td> <td>2 hr</td> <td>Web Form Email with Document Rack</td> <td></td> <td>1/5/2021</td> </tr> <tr> <td>Email with web form link</td> <td>18 hr</td> <td>Document Rack web form 2</td> <td></td> <td>12/16/2020</td> </tr> <tr> <td>image cell test w variable image</td> <td>19 days</td> <td>Merge example 1</td> <td></td> <td>11/19/2020</td> </tr> <tr> <td>Web Form Email with attached doc rack</td> <td>20 days</td> <td>Doc rack link in email 1117</td> <td></td> <td>11/17/2020</td> </tr> <tr> <td>doc rack email1 w web form link</td> <td>20 days</td> <td>1st doc rack email web form link</td> <td></td> <td>11/17/2020</td> </tr> <tr> <td>Web Form Email</td> <td>20 days</td> <td>Doc rack test 1117</td> <td></td> <td>11/17/2020</td> </tr> </tbody> </table> | Link to Recent Work | Last Updated | Reports | Show all modules | Date | test email survey data | 2 hr | Web Form Email with Document Rack | | 1/5/2021 | Email with web form link | 18 hr | Document Rack web form 2 | | 12/16/2020 | image cell test w variable image | 19 days | Merge example 1 | | 11/19/2020 | Web Form Email with attached doc rack | 20 days | Doc rack link in email 1117 | | 11/17/2020 | doc rack email1 w web form link | 20 days | 1st doc rack email web form link | | 11/17/2020 | Web Form Email | 20 days | Doc rack test 1117 | | 11/17/2020 |
| Link to Recent Work | Last Updated | Reports | Show all modules | Date | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| test email survey data | 2 hr | Web Form Email with Document Rack | | 1/5/2021 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| doc rack email1 w web form link | 20 days | 1st doc rack email web form link | | 11/17/2020 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Web Form Email | 20 days | Doc rack test 1117 | | 11/17/2020 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Step 4 | Use the drop down menu to select the desired product type. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

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The screenshot shows the DocuMatix dashboard interface. On the left is a navigation sidebar with sections: Dashboard, Account Settings, DocuMatix News, Report Center, DocuMatix Community (94), DocuMatix Product Suite (with a sub-menu: Email Manager, Events, Document Rack, Web Forms, Surveys, Web Polls, PURLs), DocuMatix On Demand, and DocuMatix Text Messaging. The main dashboard area is titled 'Dashboard' and includes: 'Link to Recent Work' table with columns 'Link to Recent Work' and 'Last Updated'; 'Reports' table with columns 'Reports' and 'Date', featuring a dropdown menu with options 'Show all modules' and 'PURLs'; 'Email Trends' chart for '2021 Opens & CTRs'; 'Email Performance' section for '2021 YTD Average' with three gauges for 'Unique Opens / CTOR', 'Total CTRs', and 'Unique CTRs'; and a 'Project Calendar' for 'January, 2021'.

Step 5 From the Reports list, which will vary depending on the product, click the item that you wish to generate the report. This will display all published products for which a report is available.

This screenshot shows the same DocuMatix dashboard as above, but the 'Reports' dropdown menu is open, highlighting 'Surveys Report'. The 'Reports' table now lists: 'Survey Training' (9/10/2018), 'Take Back' (5/7/2018), 'Marquis N' (4/30/2018), 'Webinar S' (11/21/2017), and 'Training Evaluation Survey' (11/13/2017). The rest of the dashboard layout remains identical to the previous screenshot.