

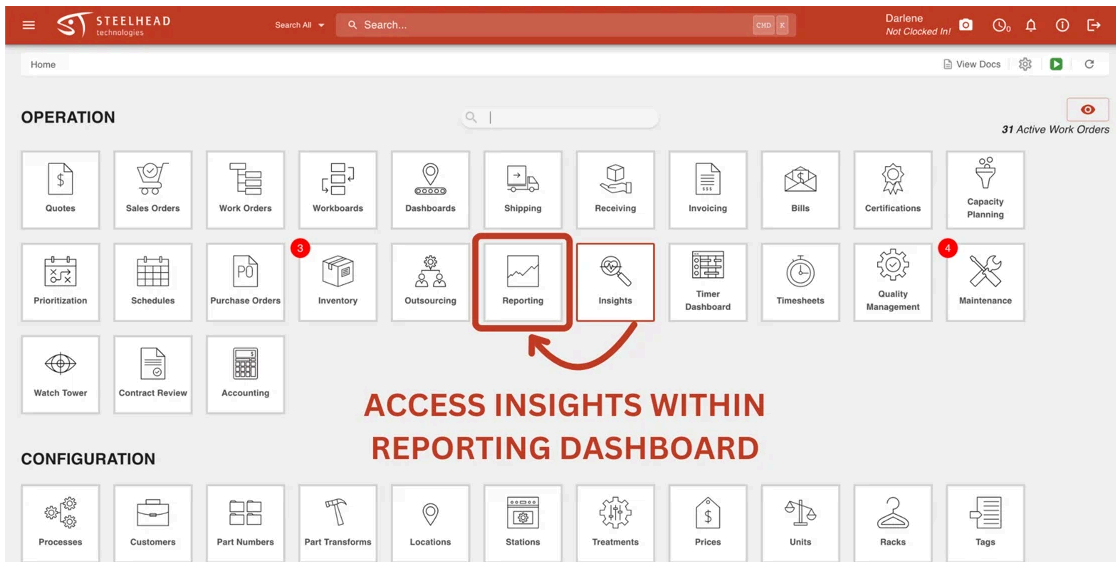
Improved Insights and Reporting

This weekend, Steelhead will be releasing an update to save you time when using Insights and Custom Reports. Insights will be nested within the Reporting dashboard, allowing you to quickly and easily compare data between Custom Reports and Insights.

[See the video below:](#)

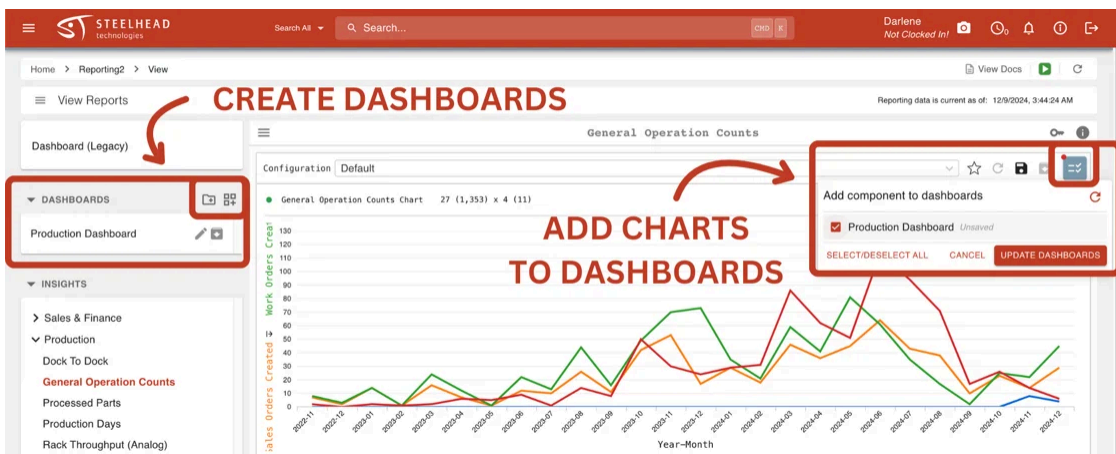


To access Insights and Reporting, click on the Reporting dashboard from your Steelhead homepage:



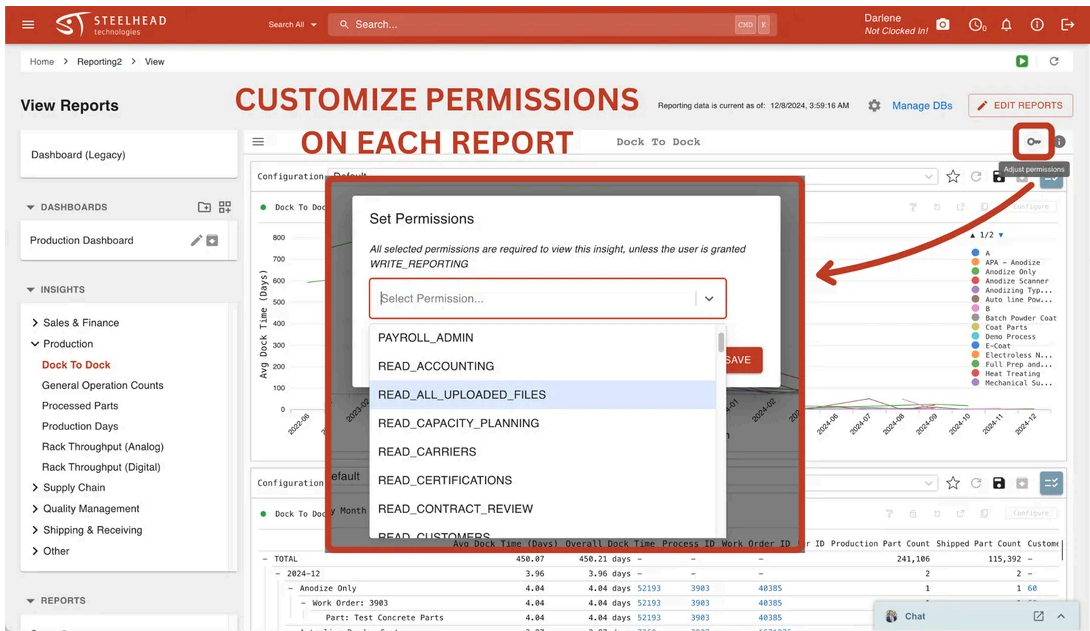
A few updates will be added to the Reporting dashboard to improve use and functionality:

- Create your own dashboards and organize them into dashboard folders. Then click the Add to Dashboard button on any chart to select which dashboards to add it to.

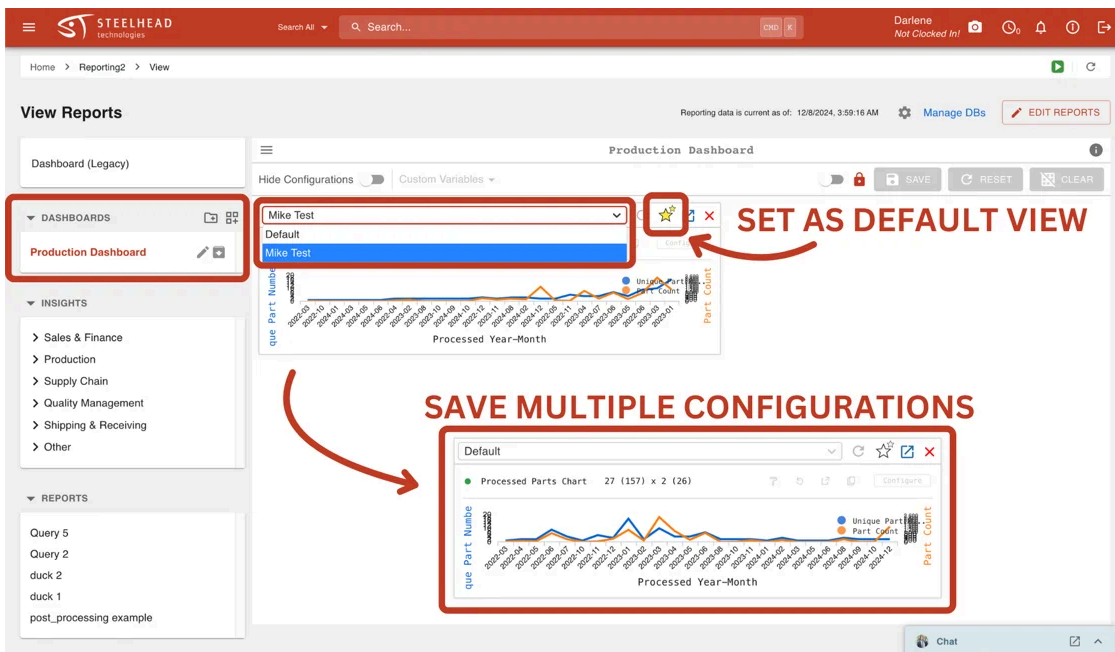


- Control which users can see which Reports. Just click the Key icon and select as many Permissions as you see fit.

You must have the Write_Reporting Permissions enabled in order to do this



- As you add different configurations of each report to customized dashboards, you can also set and change Default Views as necessary. Just click the Star icon next to the chart name.



- Within each Custom Report, as well as on the Dashboards view, you can add a custom tooltip for other users to more easily understand and use each report.

- Click on the "i" to open the tooltip
- Click on the Pencil icon to edit the description

CLICK THE "i" TO OPEN

CLICK THE PENCIL TO EDIT

This report has a customer description to give you more information.

id	name	short_name	uuid	created_at	custom_input
231	test	-	-	1/11/22, 2:23:14 PM	-
8,592	MC	-	-	6/10/22, 3:31:20 PM	-
65,856	newparttest	newparttest	-	10/19/23, 12:58:26 PM	{}
65,857	testpartnumber	testpartnumber	-	10/19/23, 12:59:52 PM	{}
22,642	ATLAS METAL PARTS CO INC	ATLASMETALPARTS	-	10/6/22, 3:13:26 PM	-
22,631	AAA PIPE & FITTINGS	AAAPIPE	-	10/6/22, 3:13:26 PM	-
4,875	Ford	-	-	5/12/22, 8:49:82 AM	-
185	Stacy Mäkelä	-	-	10/22/21, 8:53:08 AM	-
3,856	AES	-	-	3/23/22, 3:20:23 PM	-
2,755	test1	-	-	2/15/22, 10:11:08 PM	-
59,378	Customer1	Customer1	-	8/11/23, 10:17:08 AM	{}
22,682	FABPRO LLC	FABPRO	-	10/6/22, 3:13:26 PM	-
22,683	FACILITY FUNCTIONS INC.	FACILITYFUNCTIONS	-	10/6/22, 3:13:26 PM	-
22,685	FISHER BARTON INC	FISHERBARTON	-	10/6/22, 3:13:26 PM	-
22,686	FLEET SUPPORT SERVICES	FLEETSUPPORT	-	10/6/22, 3:13:26 PM	-
15,428	I don't use email	-	-	9/26/22, 2:09:50 PM	-
22,739	PIERSON PRODUCTS INC	PIERSONPRODUCTS	-	10/6/22, 3:13:26 PM	-
2,764	Test Company	-	-	2/17/22, 1:27:07 PM	-
22,819	EVALD HOULDING	EVALDHOULDING	-	10/6/22, 3:13:29 PM	-
22,820	FIBERDOME PRODUCTS, LLC	FIBERDOME	-	10/6/22, 3:13:29 PM	-
22,821	FIRST SUPPLY LLC	FIRSTSUPPLY	-	10/6/22, 3:13:29 PM	-
22,822	GLENN HEPPNER INC.	GLENNHEPPNER	-	10/6/22, 3:13:29 PM	-
22,823	GRABER MANUFACTURING	GRABERHFG	-	10/6/22, 3:13:29 PM	-
22,824	INDUSTRIAL WORKS	INDUSTRIALWORKS	-	10/6/22, 3:13:29 PM	-
23,373	Fastenal	-	-	10/18/22, 9:36:35 PM	{"email": "Info@fasten.com", "ISOEM": "yes", "ph"}

VIEW STEP BY STEP INSTRUCTIONS

We hope that these updates help you quickly and easily organize your company data so that you can gain insight into what's happening in your shop and make informed decisions that move you towards your goals.

Please reach out to your Customer Success Manager or email us at support@gosteelhead.com with any questions!

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