

# Administration guide

**PRISMA**direct

Reporting



A CANON COMPANY

**Canon**

Production Systems - Cutsheet

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# Software version

This documentation describes the functionality of PRISMAdirect v1.3.0.

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# **Chapter 1**

## Login

# [Login]

## Introduction

Depending on the application configuration, it may be necessary to identify yourself. You have to enter your user name and password.

## Procedure

1. Enter your user name.
2. Enter your password.
3. Select [Remember my user name and password.] to log on next time, without entering your user name and password.

You have to accept cookies from this application to support this option.

4. Click [Log in].

For easy access, you are advised to add this page to your personal bookmarks.

# **Chapter 2**

## Reporting

# Configure the reporting environment

## Introduction

You have to configure the reporting environment before you can generate reports in workspace [Reporting].

## Procedure

1. You have to enable accounting if you want to collect payment information in your reports. Go to: [Configuration] - [Accounting and reporting] - [Accounting] - [Accounting settings].
2. You can generate and email the reports automatically. Go to: [Configuration] - [Accounting and reporting] - [Reporting] - [Email accounting reports automatically].
3. You can select which reports you want to generate automatically. Go to: [Configuration] - [Accounting and reporting] - [Reporting] - [Accounting reports settings].  
Dialog [Accounting reports settings] in workspace [Configuration] displays the report filenames (\*.rpt). Workspace [Reporting] displays the report titles. When you create a new report, it is recommended that you use a similar report title and report filename. In this way, it is easier to identify the report between the two workspaces.
4. You have to configure the location to store the reports that are generated in workspace [Reporting]. Go to: [Configuration] - [Accounting and reporting] - [Reporting] - [Reports folder].

# Generate a report

## Introduction

You can generate the available reports manually. You have to prepare the reporting environment first. See [Configure the reporting environment on page 10](#)

## Procedure

1. Select a report type.  
Each report type contains a number of items that you can use in a query.
2. Enable and configure the items that you want to use in the query.
3. Click [Generate report].  
The application generates the report and shows a preview of the report. The report is saved on the server. The old report will be overwritten when the [Overwrite existing report] option is enabled. For each report, this option is available in [Configuration] - [Accounting and reporting] - [Reporting] - [Accounting reports settings].  
You can export the report. See [Export the report on page 12](#)

# Export the report

## Introduction

The application shows a preview of the generated report. You can export the report.

## Procedure

1. Click [Export this report] in the preview of the report.
2. Select the file format.
3. Define the which pages you want to export.
4. Click [Export].

The report is generated and becomes available in the lower-left corner of the application. The report is stored in the [Downloads] folder.

# Create Crystal reports and add them to PRISMAdirect

## Introduction

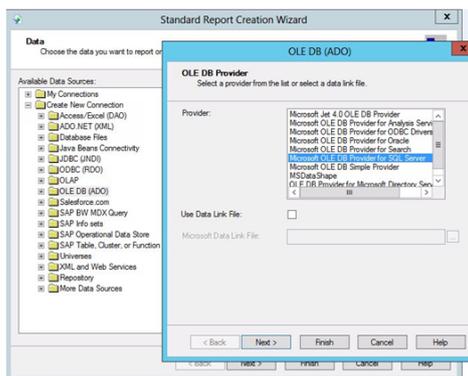
This topic describes how you can create reports using Crystal Reports which is a third party component. You have to upload the created reports in PRISMAdirect.

## Procedure

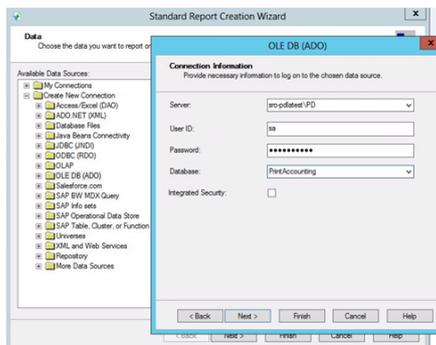
1. Open Crystal Reports Editor and select "Report wizard" to create a report.



2. Select the data source for the report.
  1. Create a new connection.
  2. Select "OLE DB (ADO)".
  3. Select "Microsoft OLE DB Provider for SQL Server".



3. Type the logon credentials for the selected data source.
  1. Select the "PrintAccounting" database

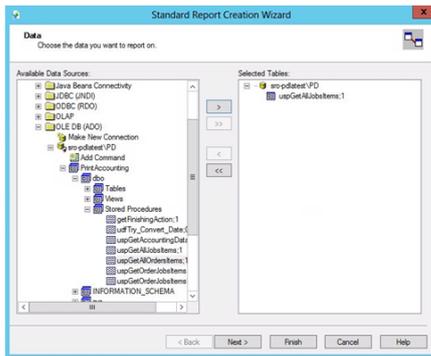


4. Select the data that you want to report on.  
You can select tables or stored procedures to report on. When you want to report on a custom ticket item at order level or job level, you have to select the stored procedure **uspGetAllOrdersItems** and/or **uspGetAllJobsItems**.

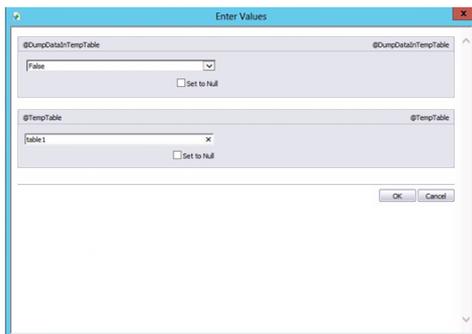


**NOTE**

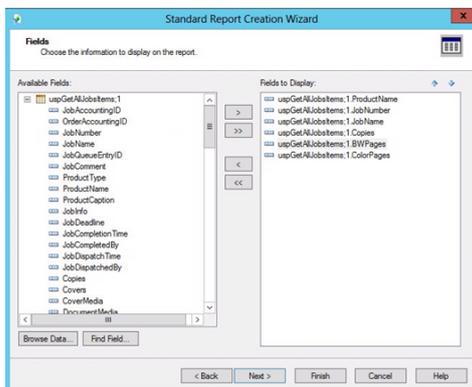
A stored procedure is a group of SQL-statements compiled into a single execution plan.



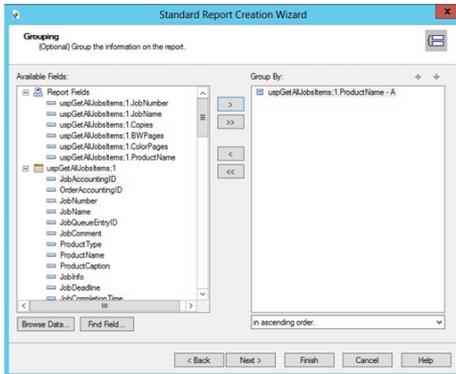
5. For a stored procedure, you have to provide the input parameters.



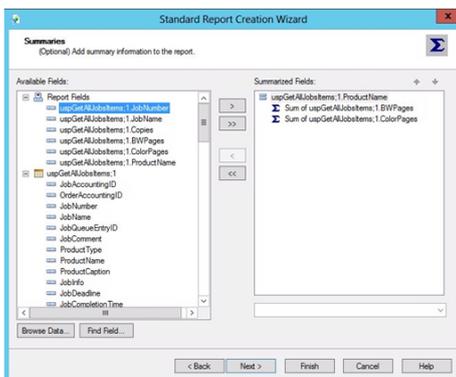
6. Select which fields you want to display in the report.



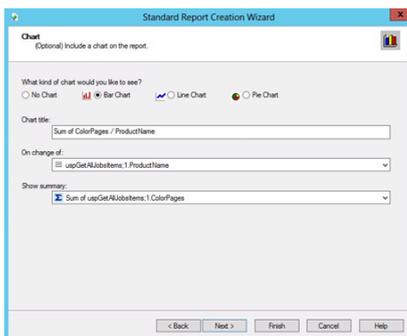
7. Optionally, you can select a field to group the data: Separating your data into groups often helps you to focus the information in the report.



8. You can select a field to add summary information to the report. For example, select the field for colour pages to display a summary of the total number of color pages in the report.



9. Select which chart you want to use for the report.



10. You can add new fields to an existing report.
  1. Expand the table or stored procedure in the "FieldExplorer" pane.
  2. Drag and drop the additional fields in section "Details" of the report.



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