




# Create Reports

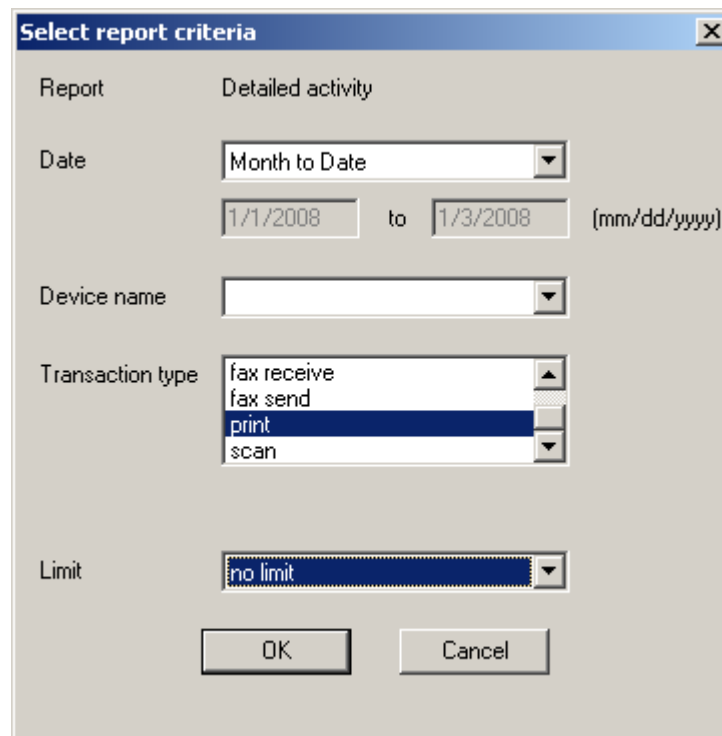
Instructor Led Training  
Chapter 3 – Exercise K

Topics include:




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- [Email a Report](#)
- [Export a Report](#)
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## Create a Report




1. Start **Equitrac System Manager** and connect to your accounting server.
2. In the left pane, click  **Reporting**; a list of report categories appears in the right pane.
3. In the right pane, click the + (plus) sign to expand **Detailed Activity**.
4. Click the **Detailed activity by device** report.
5. In the Select report criteria dialog box, click the **Transaction type** scroll bar until **Print** appears and then click the item.

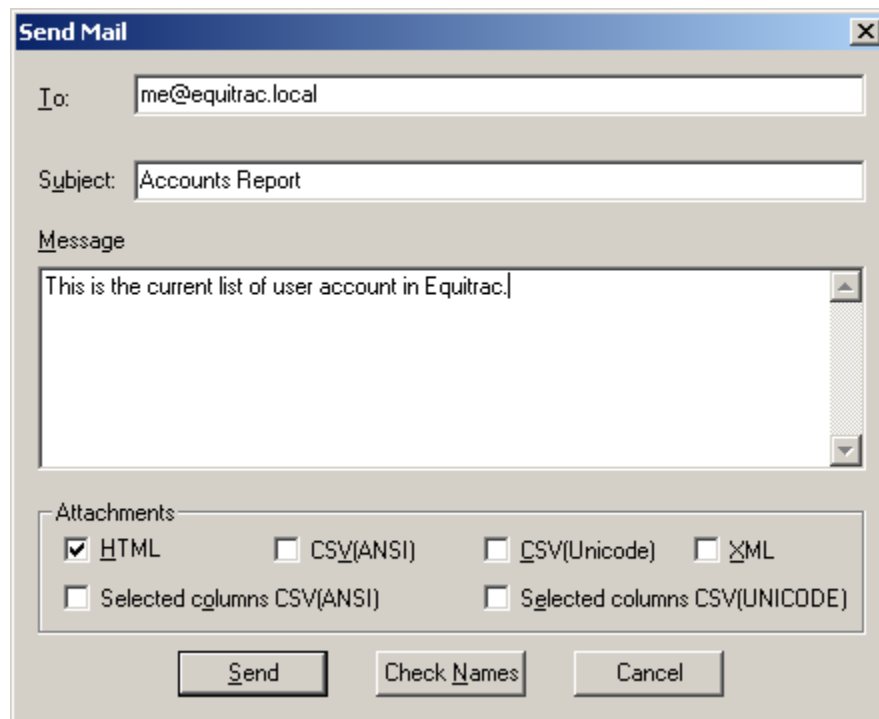


The image shows a 'Select report criteria' dialog box. It has a title bar with a close button. The dialog contains several fields: 'Report' is set to 'Detailed activity'; 'Date' is set to 'Month to Date' with a date range from '1/1/2008' to '1/3/2008' (format mm/dd/yyyy); 'Device name' is an empty dropdown; 'Transaction type' is a list box with 'fax receive', 'fax send', 'print' (selected), and 'scan'; 'Limit' is set to 'no limit'. At the bottom are 'OK' and 'Cancel' buttons.

6. Click the  button; the report appears.
7. To print the report, click the  **Print** icon at the top of the window; the Print dialog box appears.
8. Click the **PrnBW** printer and then click the  button.
9. Close the Report window.

### Email a Report

1. In **Equitrac System Manager**, click  in the left pane.
2. In the right pane, expand **Accounts**.
3. Click any report within the section.
4. Click the  button to accept the defaults and generate the report.
5. In the Report window, click the  icon.
6. In the Send Mail dialog box, fill in the applicable fields; leave the Attachment setting as HTML.

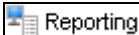

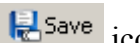


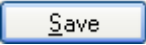


The image shows a 'Send Mail' dialog box with the following fields and options:

- To:** me@equitrac.local
- Subject:** Accounts Report
- Message:** This is the current list of user account in Equitrac.
- Attachments:**
  - ☒ HTML
  - ☐ CSV(ANSI)
  - ☐ CSV(Unicode)
  - ☐ XML
  - ☐ Selected columns CSV(ANSI)
  - ☐ Selected columns CSV(UNICODE)
- Buttons:** Send, Check Names, Cancel

7. Send the email and then close the Report window.



### Export a Report

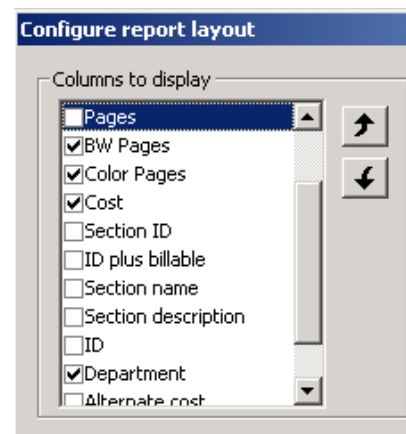
1. In **Equitrac System Manager**, click  in the left pane.
2. In the right pane, expand the **Analysis** section.
3. Click the **Device Configuration** report.
4. Click the  button to accept the defaults and generate the report.
5. In the Report window, click the  icon.
6. Save the report to your Windows Desktop.

7. In the **File name** field, type the file name **Device Configuration Report**.
8. Click the **Save as type** drop-down arrow and select **CSV-ANSI(\*.csv)**.
9. Click the  button.
10. Close the Report window.
11. Close Equitrac System Manger.
12. Click the  button and then click **Run**.
13. In the Run dialog box, type **Notepad** and then click the  button; the Notepad application starts.
14. Click **File>Open**.
15. Locate and open the CSV formatted file that was created above; the content of the exported report appears.
16. Close Notepad.

## Customize a Report

**NOTE:** The customization of a report is limited to the adding, removing, resizing, and reordering of columns.


1. Start **Equitrac System Manager** and connect to the accounting server.
2. In the left pane, click .
3. In the right pane, expand the **Summary Activity** section.
4. Click the **Summary activity by device** report.
5. Click the  button to accept the defaults and generate the report.
6. Resize the Report window to its maximum size.
7. Click **View>Configure Report Layout**.
8. In the Columns to display list, click to clear the **Pages** check box.
9. Scroll to **Department** and then click to select the check box.



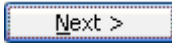
10. Scroll to the top of the list and click the word **Account**; do NOT click to clear the check box.

**NOTE:** If the Label field is unavailable, the check mark has been cleared from the entry. Click to select the **Account** check box; the Label field becomes available.

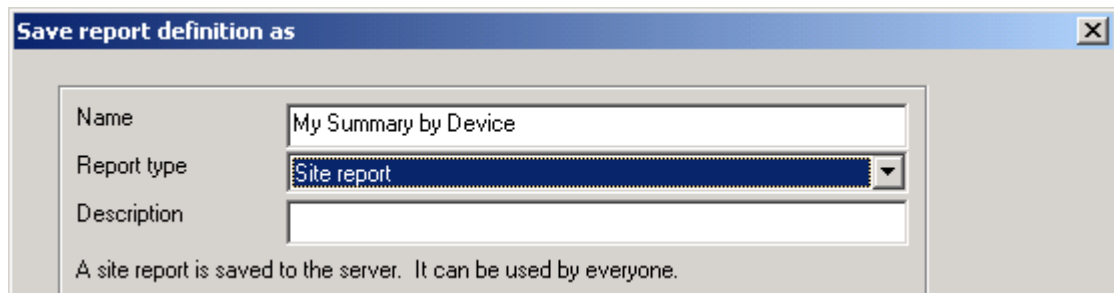
11. In the **Label** field, type **Account ID**.

12. Click the  button.

13. Click **File>Save Definition As**.

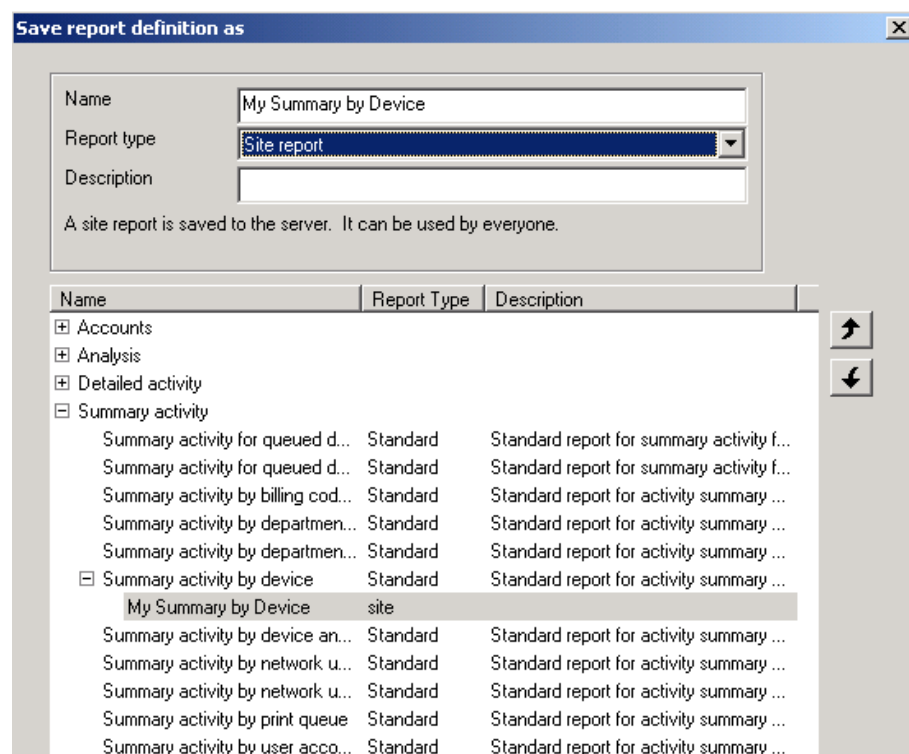
14. In the Save report definition as dialog box, click the  button; leave all defaults as displayed.

15. In the next Save report definition as dialog box, in the **Name** field, type **My Summary by Device**.





The dialog box titled "Save report definition as" has a blue header bar with a close button (X) on the right. It contains three input fields: "Name" with the text "My Summary by Device", "Report type" with a dropdown menu showing "Site report", and "Description" which is empty. Below these fields is a message: "A site report is saved to the server. It can be used by everyone."

16. Click the **Report type** drop-down arrow and select **Site**; the report appears in the list.


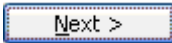




The dialog box is the same as in the previous image, but with an expanded "Report type" dropdown menu. The dropdown shows a list of reports with columns for Name, Report Type, and Description. The report "My Summary by Device" with Report Type "site" is highlighted.

Name	Report Type	Description
+	Accounts	
+	Analysis	
+	Detailed activity	
-	Summary activity	
Summary activity for queued d...	Standard	Standard report for summary activity f...
Summary activity for queued d...	Standard	Standard report for summary activity f...
Summary activity by billing cod...	Standard	Standard report for activity summary ...
Summary activity by departmen...	Standard	Standard report for activity summary ...
Summary activity by departmen...	Standard	Standard report for activity summary ...
-	Summary activity by device	Standard
My Summary by Device	site	
Summary activity by device an...	Standard	Standard report for activity summary ...
Summary activity by network u...	Standard	Standard report for activity summary ...
Summary activity by network u...	Standard	Standard report for activity summary ...
Summary activity by print queue	Standard	Standard report for activity summary ...
Summary activity by user acco...	Standard	Standard report for activity summary ...

17. Click the  button.
18. Close the Report window.
19. Click the  button.
20. Expand the **Summary Activity** section; note the +sign beside the **Summary activity by device** report, which was the basis for the custom report.
21. Expand the **Summary activity by device** report; the custom report **My Summary activity by device** appears.

Name	Report Type	Description
Accounts		
Analysis		
Detailed activity		
Summary activity		
<a href="#">Summary activity for queued documents b...</a>	Standard	Standard report for summary activity for queued d...
<a href="#">Summary activity for queued documents b...</a>	Standard	Standard report for summary activity for queued d...
<a href="#">Summary activity by billing code account</a>	Standard	Standard report for activity summary by billing cod...
<a href="#">Summary activity by department account</a>	Standard	Standard report for activity summary by departmen...
<a href="#">Summary activity by department membership</a>	Standard	Standard report for activity summary by departmen...
<a href="#">Summary activity by device</a>	Standard	Standard report for activity summary by device
<a href="#">My Summary by Device</a>	Site	
<a href="#">Summary activity by device and date</a>	Standard	Standard report for activity summary by device an...
<a href="#">Summary activity by network user</a>	Standard	Standard report for activity summary by network u...
<a href="#">Summary activity by network user and de...</a>	Standard	Standard report for activity summary by network u...
<a href="#">Summary activity by print queue</a>	Standard	Standard report for activity summary by print queue
<a href="#">Summary activity by user account</a>	Standard	Standard report for activity summary by user acco...
Total activity		

22. Click the **Summary activity by device** report again and run the report; use the default values.
23. Click the  button.
24. Click **File>Save Definition As**.
25. In the Save report definition as dialog box, click the  button; leave all defaults as displayed.
26. In the next Save report definition as dialog box, in the **Name** field, type **My Second Summary by Device**; leave the **Report type** field set to **Personal report**.
27. Click the  button.
28. Close the Report window.
29. Click the  button.
30. Run each report using the default values; note the customizations.

2/15/2008

**Summary activity****Original Report****by device**

Reporting period 2/1/2008 to 2/15/2008

192.168.92.77 deleted device						
Account	Account description	Jobs	Pages	BW Pages	Color Pages	Cost
administrator	System created.	3	0	0	0	0.00
		3	0	0	0	0.00

2/15/2008

**My Summary by Device****Customized Report****by device**

Reporting period 2/1/2008 to 2/15/2008

192.168.92.77 deleted device						
Account	Account description	Jobs	BW Pages	Color Pages	Cost	Department
administrator	System created.	3	0	0	0.00	
		3	0	0	0.00	