How to open a printing report

PD Reports shows what has been printed, copied, scanned and faxed (and phoned, where telephone management is licensed), grouped and totalled the way you choose. This article shows how to open a usage report and save it as a PDF, Excel or other file. The other reporting how-to articles use the same steps with particular settings.

To have a report emailed to someone on a schedule instead, see *How to set up automatic emailing of reports*.

Open a usage report

1. Open **PD Reports**.
2. In the tree, click **Reports** > **Usage Reports**, then choose what the report covers:
   - **All Usage Reports** for printing, copying, scanning and faxing together,
   - or **Printouts**, **Copies**, **Scans** or **Faxes** for one kind only.
3. Click how the data must be grouped, for example **Grouped by User** for totals per user, or **Grouped by Department**, **Grouped by Device** or **Grouped by Account Code**. The report's settings appear on the **Data Options** tab.
4. Choose the settings (described below), then click **Open Report**.

The report opens in its own window. A detailed report has a list of its groups on the left (for example each user); click one to jump to it.

The report settings

The **Data Options** tab has these settings:

- **Report type: Summary (Show group totals)** for totals only, or **Detailed (Show every transaction)** to list every job. In a detailed report, **Order** sets the order of the jobs, and **Each user on a new page** starts each group on a new page.
- **Time Period:** choose a **Period**, such as **Last month** or **A full month until today**. To choose your own dates, choose **Custom** and set **From** and **To**.
- **Include data:** tick what the report must include: **Print**, **Copy**, **Fax** and **Scan** (All Usage Reports only).
- **Top level group:** the grouping you chose in the tree. **Order** sorts the groups, for example **Alphabetical**. To add a chart, tick **Graph** and choose **Bar graph** or **Pie graph**, and what it shows in **by** (for example **Amount**).
- **Include 2nd level group:** tick it to split each group again, and choose the grouping in **Group by**. For example, for each user's totals per printer, choose **Grouped by User** in the tree and **Device** here. **Include 3rd level group** adds a third level the same way.

Report on only some users, departments or devices

Each grouping adds a filter tab next to **Data Options**, for example **Filter Users**, **Filter Accounts** or **Filter Departments**. To limit the report:

- Click the filter tab and tick its **Filter** tick box (for example **Filter users**).
- Tick the items to include. To find one quickly, type part of its name in **Search for**. **Selected** shows how many you have ticked.
- Deleted users and accounts are hidden unless you tick **Show deleted Users** (or **Show deleted Accounts**).

Save the report as a file

1. With the report open, click the **Export** button, the first button on the report's toolbar. The **Export Report** window opens.
2. In **Save as type**, choose the format. **PDF (*.pdf)** is chosen by default. For Excel, **Microsoft Excel (*.xlsx)** keeps the report's layout, and **Microsoft Excel - Data Only (*.xlsx)** saves only the figures, which is easier to sort and total in Excel.
3. Choose where to save the file, enter a **File name**, and click **Save**.

Related articles

- *How to set up automatic emailing of reports*
- *How to open a detailed printing report for a specific user*
- *How to open a summary report of prints per user for a specific department*

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