

Reports Module

Simply create reports on all the data collected by ESIA. Send them automatically at intervals of your choosing. The reports will be automatically generated and transmitted with their updated data. The reports are divided into blocks. You can consult [the list of blocks](#).

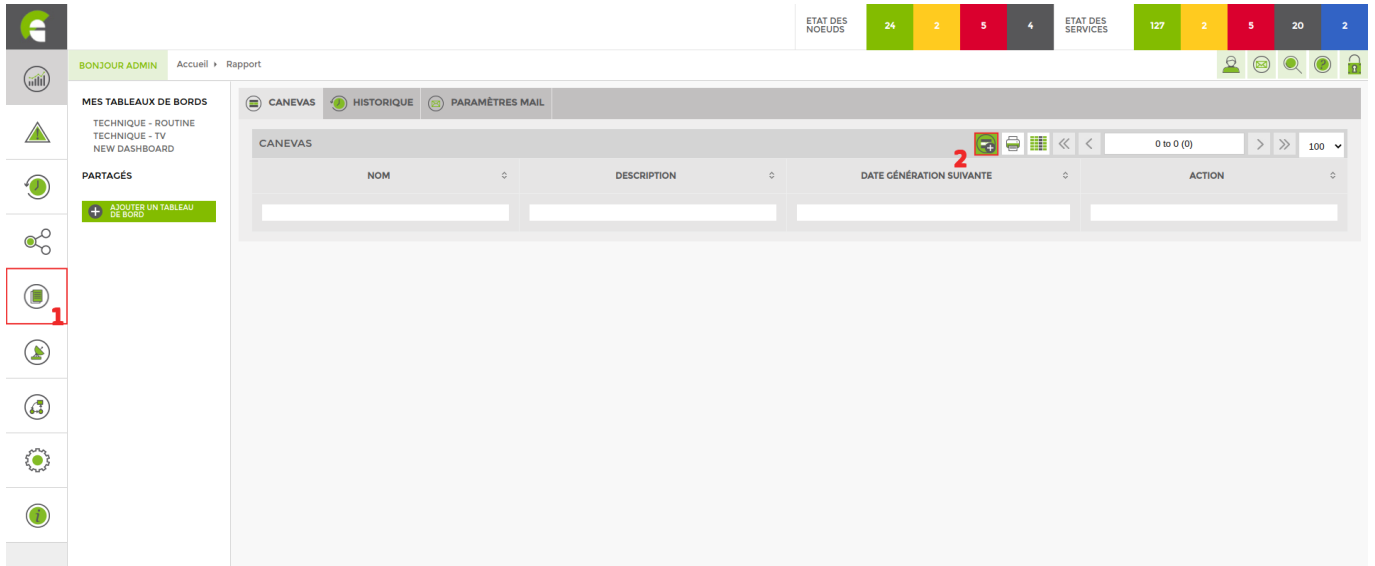



Report

This tab allows you to create a report template and repeat it over time. It can be modified at any time.

How to add a report

Go to the **“Report”** then **“Add”**.



Click on the icon . You will be taken to the following page:

The 'AJOUTER CANEVAS' form is divided into three main sections:

- PARAMÈTRES DU CANEVAS:** Includes fields for 'Nom du Canevas', 'Description', 'Génération' (dropdown menu set to 'Toutes les années'), and 'Date génération suivante' (21/02/2023).
- PARAMÈTRES DU RAPPORT:** Includes fields for 'Nom du rapport', 'Taille de la police' (20), 'Couleur de la police' (color picker), 'Nom du client', 'Description du titre du rapport', and 'Langue du rapport' (dropdown menu set to 'Français'). It also features an 'Image du rapport' field with the 'esia' logo and a 'Charger nouvelle image' button.
- PARAMÈTRES DES ENVOIS DE MAIL:** Includes fields for 'Génééré par', 'Destinataire(s)' (with a 'Select Some Options' button), 'Sujet mail', and a large 'Texte mail' text area.

An 'Ajouter Canevas' button is located at the bottom left of the form.

Now you need to fill in the **canvas parameters**, **report parameters** and the **e-mail parameters**.

Report parameters

To set up the canvas, you need to :

- Name the canvas
- Give the canvas a description
- Define the sending interval (daily, weekly, etc.) using the drop-down list.
- Define the date of the first transmission. From this date onwards, the time interval will apply.

Report parameters

In this section you can:

- Name the report
- Choose the font size for the report name.
- Define the font colour
- Enter the client's name
- Give a description of the report title
- Choose the report language
- Choose a report header logo (default is ESIA)

Email settings

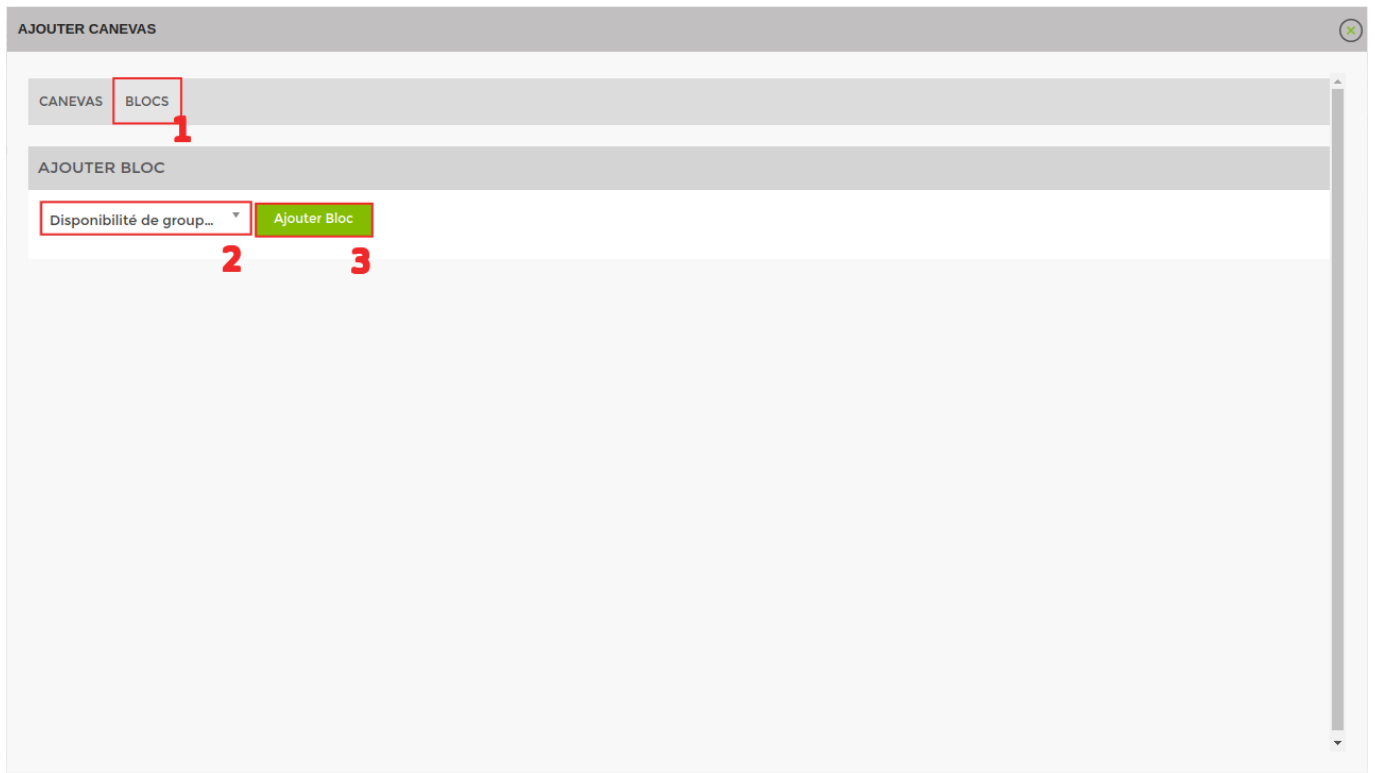
This tab allows you to :

- Enter the name of the person who generated the report
- Choose a recipient (a user created in ESIA)
- The subject of the email
- The text of the email

You can now add your canvas by clicking on the button at the bottom of the window.

Adding blocks

Once a canvas has been added, ESIA will tell you in the same window that your report canvas is missing blocks. A block is a space in your report which will contain the information you require.

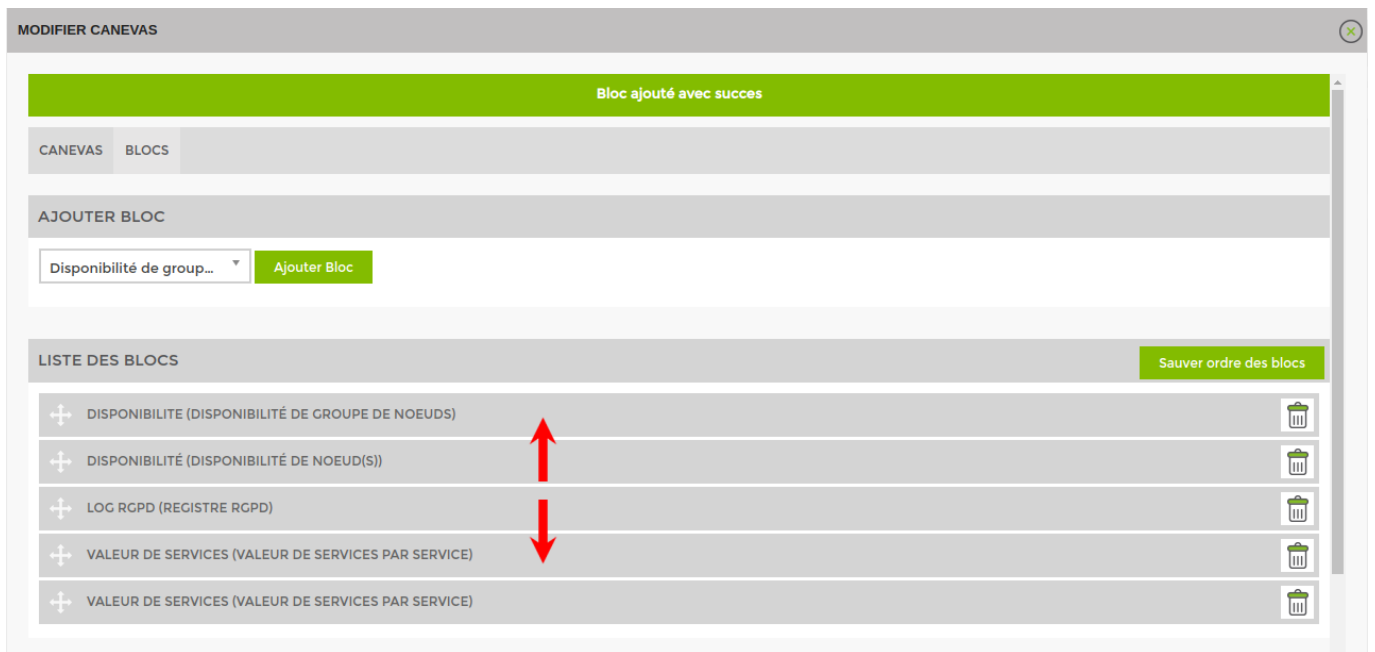


You can consult [the list of blocks](#).



Organising and completing your blocks

Once you have added your blocks, you can organise their order by dragging and dropping them. This will represent the structure of your report. By clicking on the block name, you can set the parameters and choose the information the block should contain.



Generate the report

Once you have completed all the above steps, the last section, "Generate report", appears. Here you can name the report and decide whether or not you want to receive it by email.



- **View report** Allows you to preview the report.
- **Generate report** Generates the report instantly















Template

Once the canvas has been created, you can find it in the tab « **caneva** ».

From here you can **duplicate it** **share it** **edit it** or **delete it**.

NOM	DESCRIPTION	DATE GÉNÉRATION SUIVANTE	ACTION
TP-Rapport		10/02/2024	[edit] [share] [delete]
test		21/02/2023	[edit] [share] [delete]

History

NOM DU CANEVAS	NOM DU RAPPORT	DATE GÉNÉRATION	DATE GÉNÉRATION DÉBUT	DATE GÉNÉRATION FIN	ACTION
test	test	20/02/2023	20/02/2022	20/02/2023	  
TP-Rapport	BUG-RAPPORT	10/02/2023	10/02/2022	10/02/2023	  
TP-Rapport	BUG-RAPPORT	09/02/2023	09/02/2022	09/02/2023	  
TP-Rapport	BUG-RAPPORT	09/02/2023	09/02/2022	09/02/2023	  

This tab contains all the reports generated in ESIA. You can **view** **download** **download them** in pdf format or **delete them**.

Mail settings

PARAMÈTRES MAIL	
Serveur Mail	<input type="text"/>
Utilisateur	<input type="text"/>
Mot de passe mail	<input type="password"/>
Emetteur	<input type="text"/>
Port smtp	<input type="text" value="465"/>
Ssl	<input checked="" type="checkbox"/>

This tab allows you to set the various mail parameters:

- The mail server
- The sender
- The mail password
- The smtp port
- Activate or deactivate the SSL protocol

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