Prisma Reporting

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1. Overview

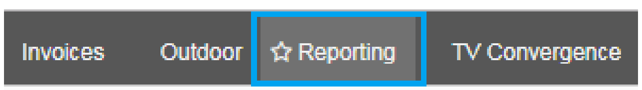
You can run a number of standard reports and create/run custom reports in the Prisma **Reporting** module.

Reports are grouped into several categories. Your security access determines what reports you can run, customize, schedule, save, and delete.

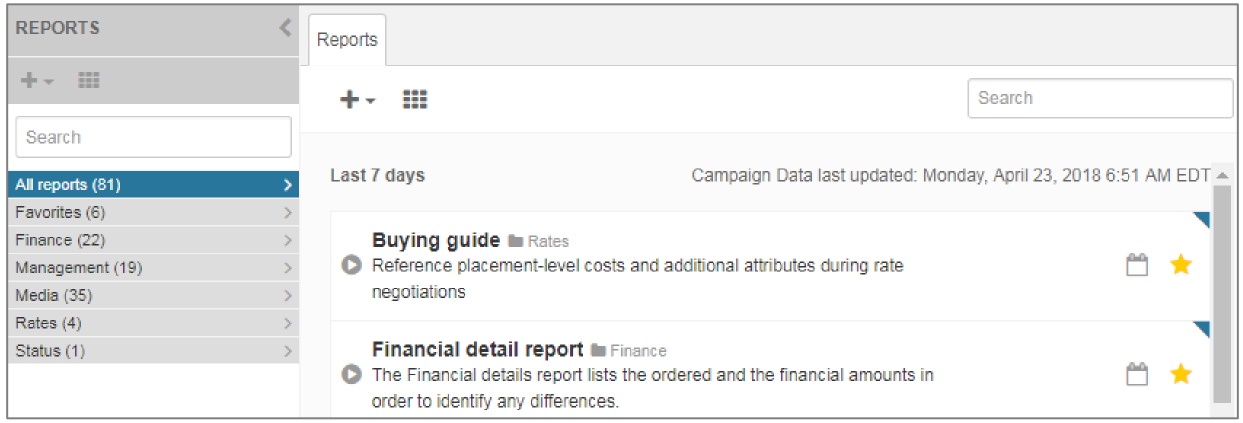
✱ All reports capture a snapshot of the data available in Prisma. Please see the online help for more information.

2. Reporting home page

To access the **Reporting** module, select **Reporting** from top toolbar.



*✱ Click the star next to **Reporting** to make it your default home page.*



The **Home** page displays all the reports you have access to. Each report is listed with a brief description.

- Reports are grouped in categories listed on the left side of the screen. Click a category to see its reports.
- Click ☆ to the right of the report description to save it to the **Favorites** folder. To remove a favorite, click the star again.
- Standard reports are identified by a blue triangle above the **Favorite** star.
- To search for a specific report, enter criteria in the **Search** field on the left side of the screen.

Standard reports template

You can find reports in their relevant category folder on the left side of the home page. Depending on your security, you may be able to view some or all of the following categories:

Report category	Types
Finance	Financial alerts (Detail & Summary), Financial detail, Missing invoice, Order lookup, Placement lookup and Invoice status
Management	Proposals (Summary statistics & Supplier), Rank advertisers by spend, Rank suppliers by spend, Spend by buy type, User activity (Campaign events), Year-over-year comparison
Media	Attribution, Campaign pacing, Campaign performance by goal, Client authorization, Creative performance, Cross-campaign performance (eCPA), Effective campaign performance, Order alerts (Detail & Summary), Pacing by month, Planned vs. actuals, Rank campaigns by pacing, Savings tracking, Spend summary, Supplier performance
Rates	Buying guide, Historical rates by supplier
Status	Order status

✱ For more information on what fields are included on these reports, please refer to online help within the application.

Prisma Reporting

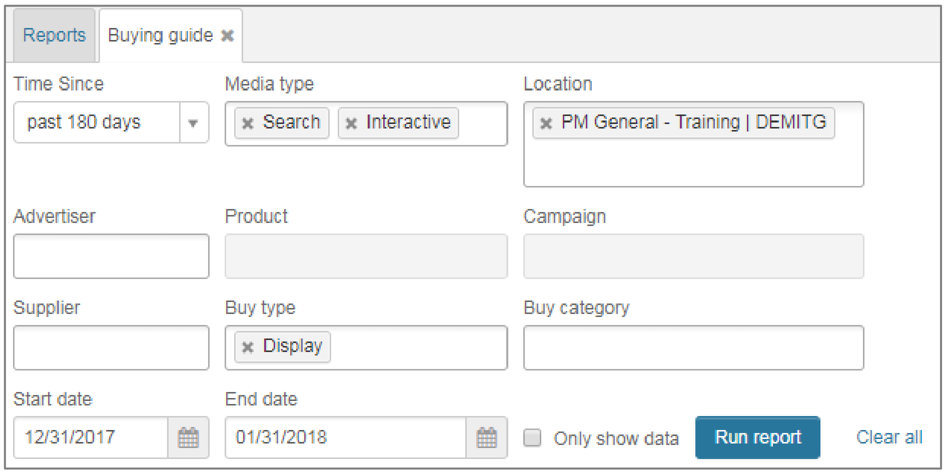
3. Run a report

To run a report using the same filter values as the last time it was run:

Click next to the report's name to immediately run the report using the same filter values as the last time it was run.

To run a report with new filters:

1. Click the report title to open it in its own tab within the current **Reporting** module browser tab. The tab displays the report's **Filters** pane and enables you to specify new filter values before running the report.



2. Specify the report filters (which vary depending on the report that you are running).
3. Click **Run report**.

✱ *If your report exceeds 200,000 lines, the request will be terminated and you will be prompted to re-submit your request with additional filters applied to reduce the amount of data returned.*

Export the report

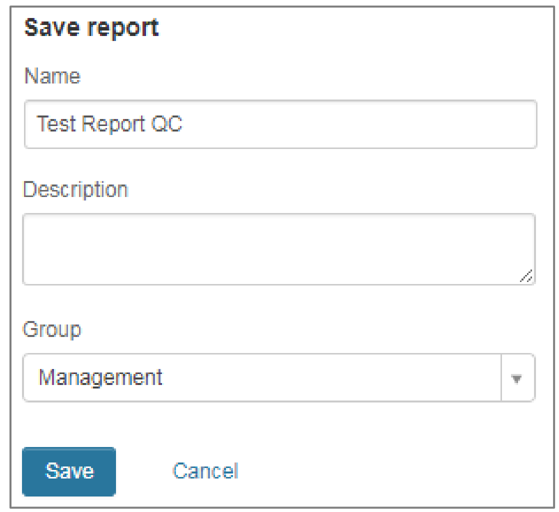
4. Click Export and choose a format from the drop-down list.

4. Edit and save an existing report

Reports are shared throughout your agency. You can edit any report you have access to.

To edit an existing report:

1. Navigate to the report you want to edit.
2. Hover over the report's name and click to open the report on the **Report Designer** page.
3. Make the necessary changes.
4. Click . The following window displays:



- Click **Save** to overwrite the original report.
- To save your own version of the report, edit the **Name** (and **Description** field if desired). Choose the folder where you want to save the report in the **Group** field. Click **Save.**

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