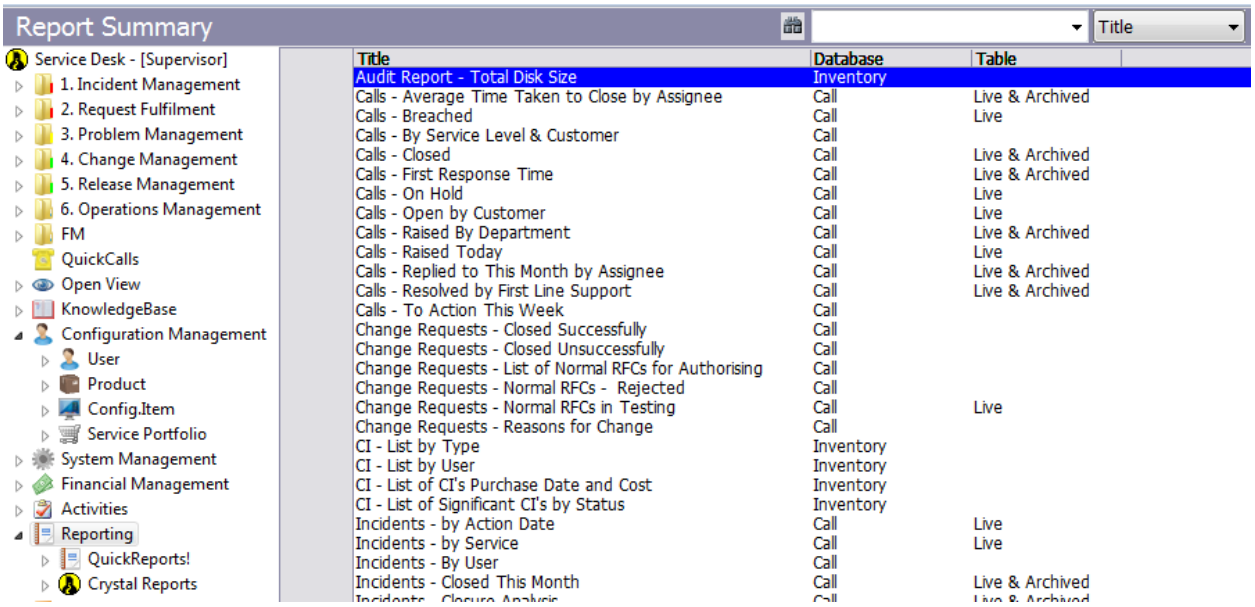
QuickReports Guide

Use QuickReports to produce lists, summaries and charts from the data in SupportDesk.

If in the Windows application **Access QuickReports**, from **Reporting** within the Explorer panel.

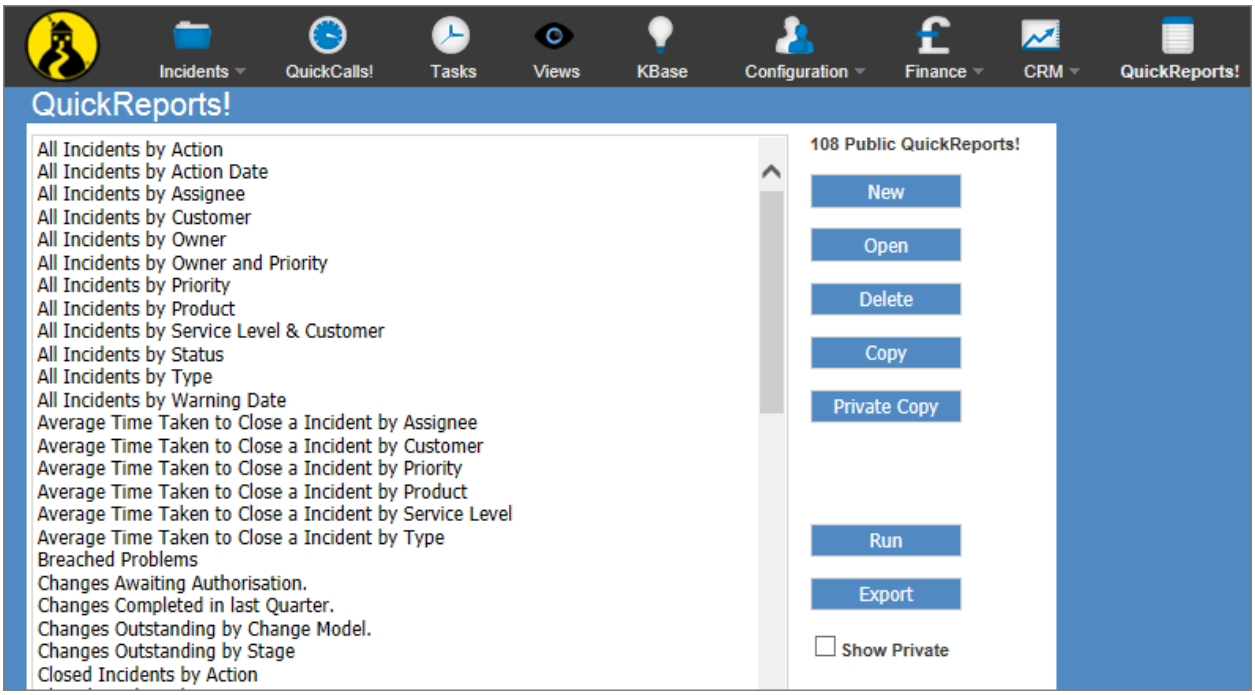
QuickReports Summary



Use right mouse click to present a menu of options

Open	to edit the selected report.
New	to create a new report.
Delete	to clear a report that is no longer needed, providing you are authorised to do this.
Copy	creates a report based on a selected report. The new report is added to the list and is initially titled 'Copy # of <original title>'. You should therefore open the report to change the title and other details.
Run	outputs the report as a file in html format. The file is saved in the publish directory specified in the SupportDesk configuration file.
Export to CSV	creates a text file containing comma separated values. You can browse the results.
Email	To run the report and send the results to the email address supplied.

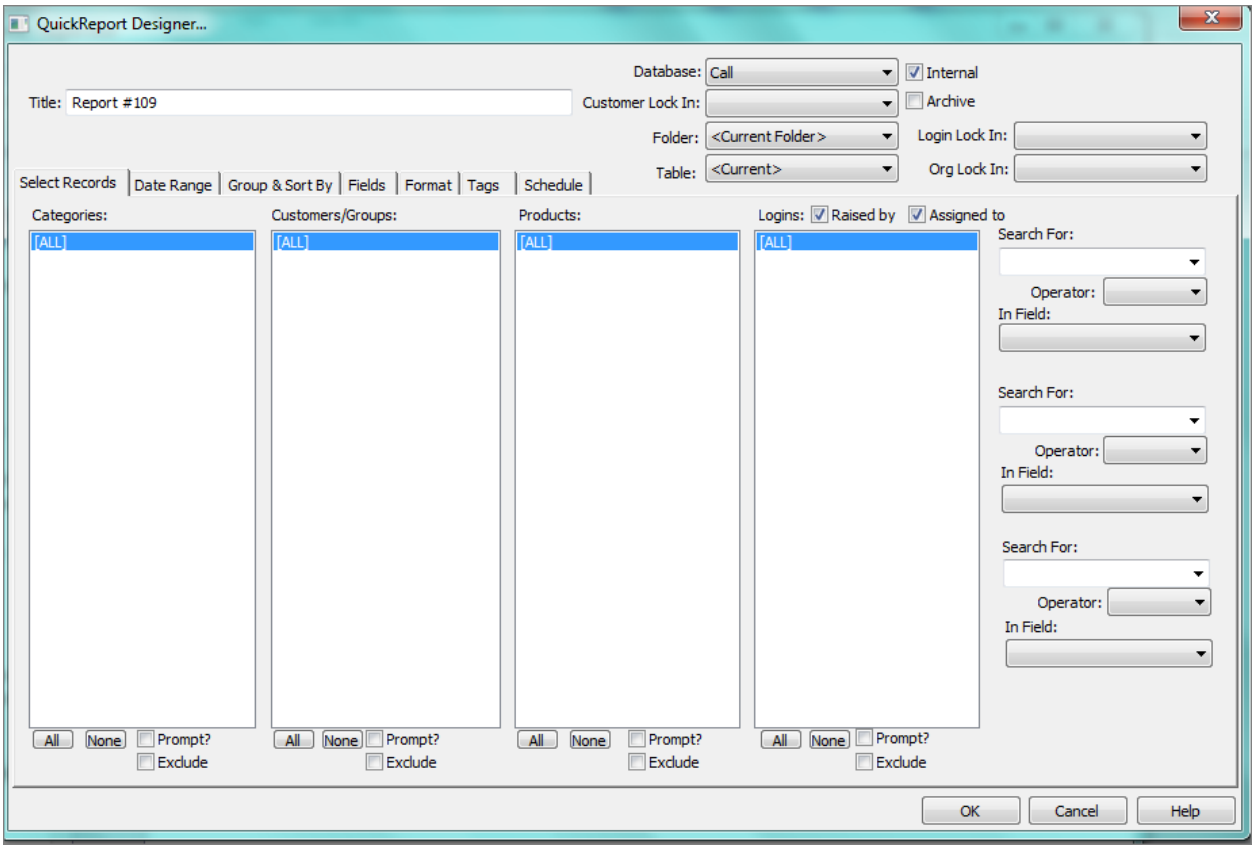
On the Web Interface the Reports are access from the QuickReports menu option and options are shown for the selected report, or "New" allows creation of a new report.


Incidents
QuickCalls!
Tasks
Views
KBase
Configuration
Finance
CRM
QuickReports!
QuickReports!
All Incidents by Action
All Incidents by Action Date
All Incidents by Assignee
All Incidents by Customer
All Incidents by Owner
All Incidents by Owner and Priority
All Incidents by Priority
All Incidents by Product
All Incidents by Service Level & Customer
All Incidents by Status
All Incidents by Type
All Incidents by Warning Date
Average Time Taken to Close a Incident by Assignee
Average Time Taken to Close a Incident by Customer
Average Time Taken to Close a Incident by Priority
Average Time Taken to Close a Incident by Product
Average Time Taken to Close a Incident by Service Level
Average Time Taken to Close a Incident by Type
Breached Problems
Changes Awaiting Authorisation.
Changes Completed in last Quarter.
Changes Outstanding by Change Model.
Changes Outstanding by Stage
Closed Incidents by Action
108 Public QuickReports!
New
Open
Delete
Copy
Private Copy
Run
Export
Show Private

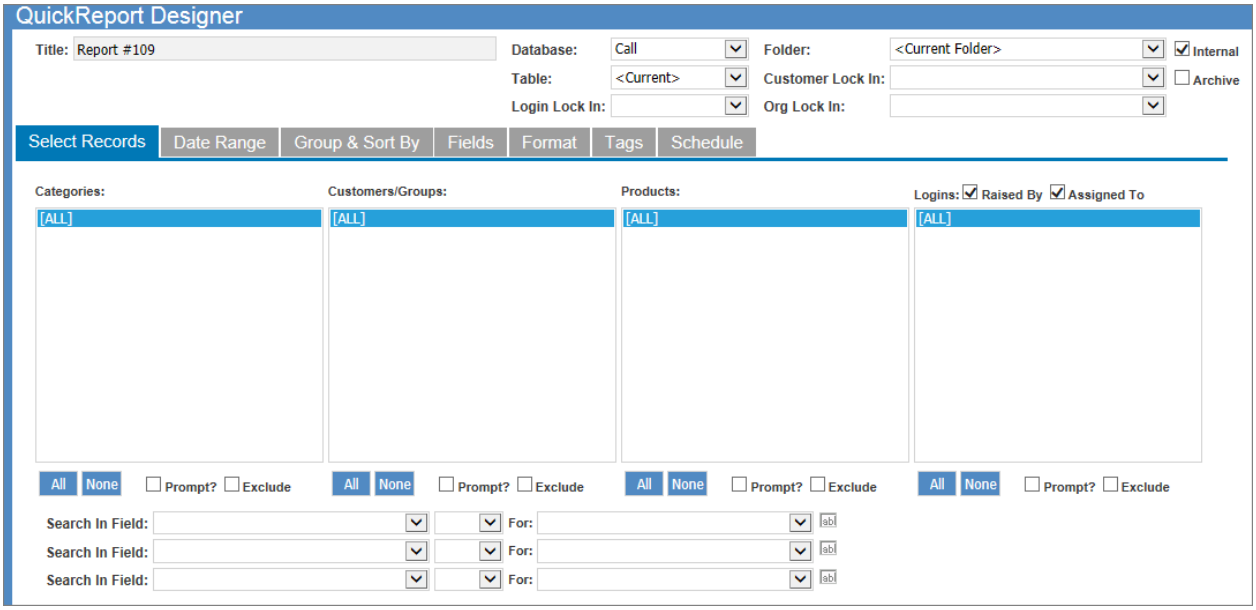
Creating a New Report

QuickReports are designed over various tabs. In this section the windows application is shown first followed by the web application interface.

1. QuickReport Designer, Select Records Tab



Web UI



Title Enter the text that is to appear at the top of the report. This field is used to identify existing reports when they need to be updated or run again.

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Database	Choose the database that is to be reported on.
Customer Lock In	Select a customer if only that customer can use the report through the WebServer.
Org Lock In	Select an Organisation if only that Organisation can use the report through the WebServer. Only WebGuests that are locked to the same Organisation will have access to this report
Login Lock in	Select a login if only that login can use the report through the webserver.
Folder	Identify the call folder that provides data for the report. This may be <Current Folder> and so uses the one that is currently selected, or be one that you specify.
Table	You may want to base the report on live or archived records or both, or choose <Current> to use whichever type is selected.
Internal	Tick the box if the report is not to be available to a WebGuest accessing via the WebServer.
Fields	The lists of fields to include all operate in the same fashion and you will use them to filter the records appearing in the report. The available entries depend on the database chosen. Click the corresponding All button to select all the entries; subsequently clicking an individual entry deselects it. Similarly, click the corresponding None button to deselect all the entries. Use the <Blank> entries to select records that have no value for this particular field. For example, if you select priority <Blank>, calls with no set priority are considered for the report. Records meeting the highlighted selection criteria are included in the report. The category group name prefixes each code.
Categories	
Customers/Groups	Use the entry <Customer> when creating a report for Web Guest logins. This restricts the call selection to the Web Guest's calls. Use the Group entries to report on this group of customers.
Products	Products are listed with their versions.
Logins	Logins can only report on calls they are allowed to view. You can use the <Login> entry to create a report for individual users who have logged in.
Raised by **Assigned to**	Use these check boxes to differentiate between calls assigned to or raised by a login.
Prompt?	Tick the box against any of the four lists to cause entries to be selected at report run time. If so, when the report is run, a list box appears for each of the marked subsets in turn so that you can select the values required. If the report is to be run as a scheduled report ensure that there are no prompts required on the report.
All	Tick the All box if the report is to include all categories.
Exclude	Tick the box to exclude records with the highlighted values.
Search For **Operator** **In Field**	Use these fields to filter the records from the selected database. It is easiest to choose the field first as the search for entry will then offer valid values.

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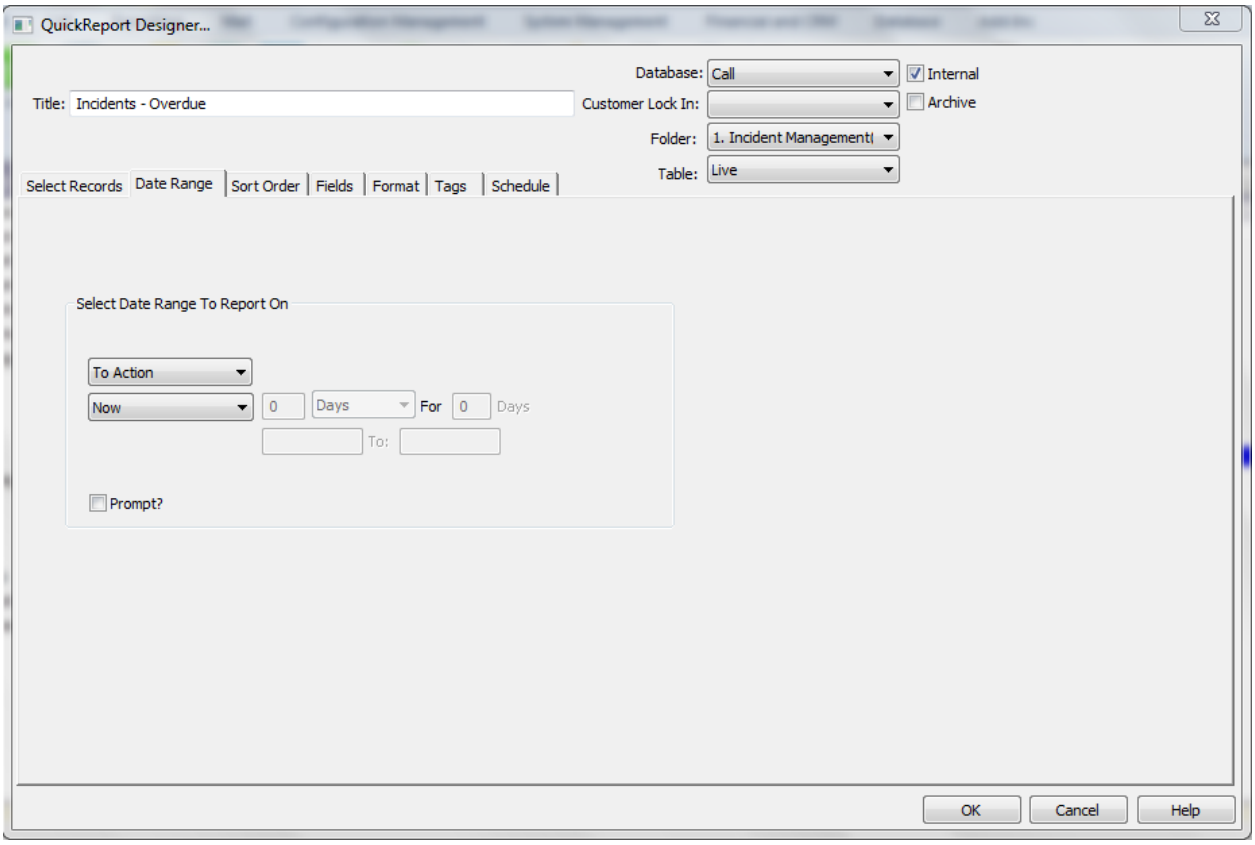
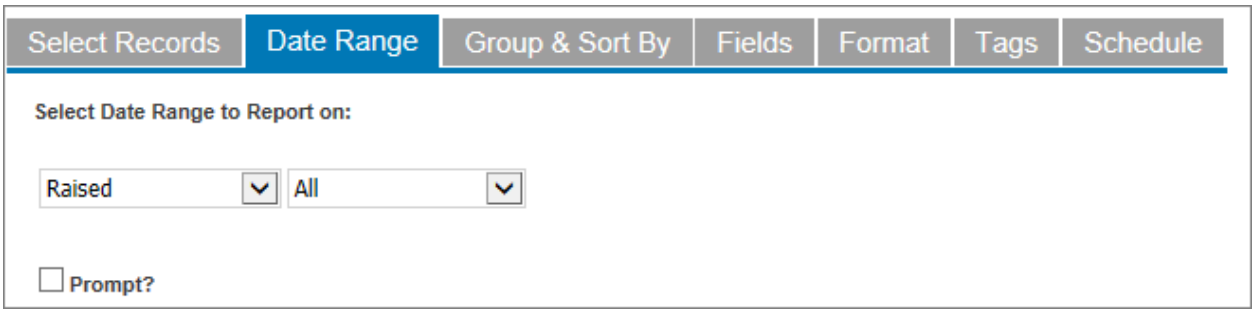
2. QuickReport Designer, Date Range Tab



Web UI



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Date Selector

Select from the drop down the date you want to search on. The default is **Raised**, i.e. the open date.

Closed
First Note Added
Last Updated
Note Added
Outstanding(the open date of calls that are still open)
Raised
To Fix/Action
Warning/reminder
[Close Date]
[Counter Date]
[Date]
[End Date]
[Esc. Date]
[Extra Date1]
[Extra Date2]
[Extra Date3]
[Extra Date4]
[Fix Date]
[Last Update Date]
[Outage Date]
[Resolved Date]
[Responded Date]
[Response Date]
[Stop Date]
[Warning Date]

Value Selector

All - to include all records with the selected date.

Dates - to input a date range. Records with dates on and within this range are included in the report. Enter both date fields.

End Of - to include records with a date up to the end of a selected period, such as a week or next year.

Last - to indicate if the date is to be in a previous period.

More Than - to include records more than the number of time units old. In addition, you can specify an end range.

Next - if the date is to be within a future period.
Now - records with dates of now or earlier are presented.
This - records where the date falls within a current period.
Today - report on records where the date is the same as today's
Within - report on records with a date within the selected range.
Yesterday - to list records where the selected date is yesterday.

Prompt? ☑ Tick the box so that you can specify date range parameters at run time.

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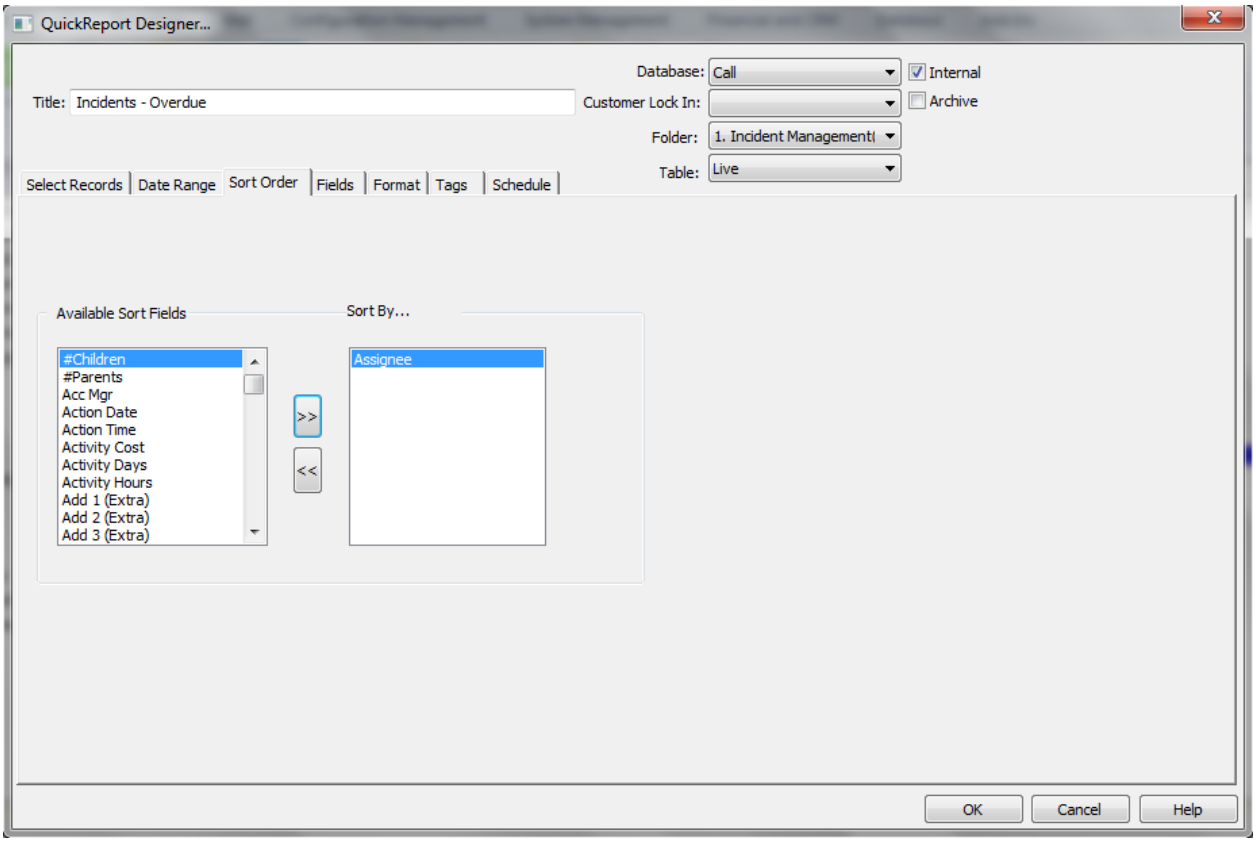
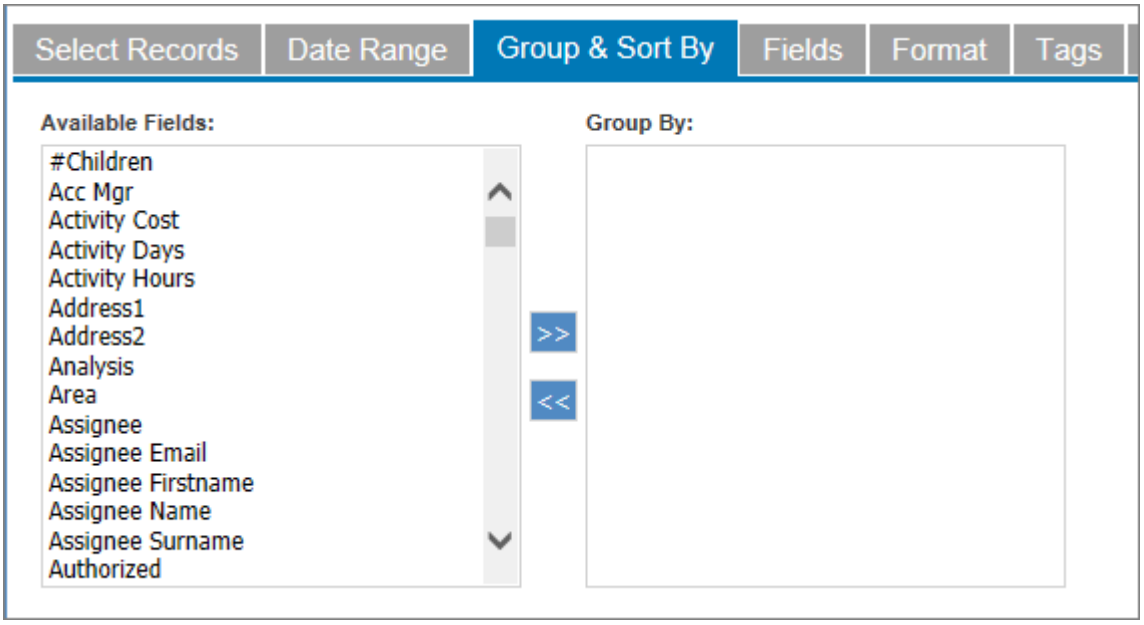
3. QuickReport Designer, Sort Order Tab



Web UI



Sort By… The fields to be used for sorting must be listed here in the required order of priority. Use the arrow buttons to make your selection from the list of available sort fields. The available fields will relate to the selected database.

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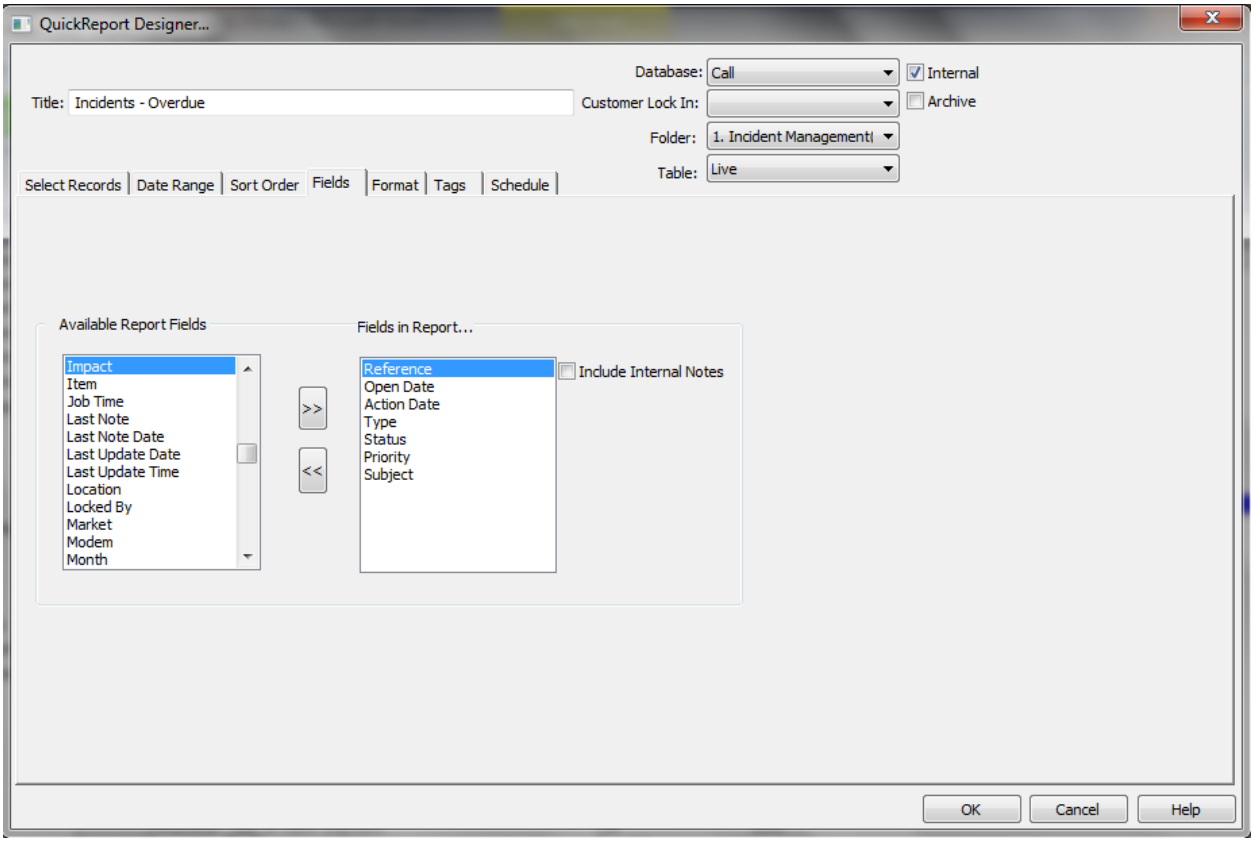
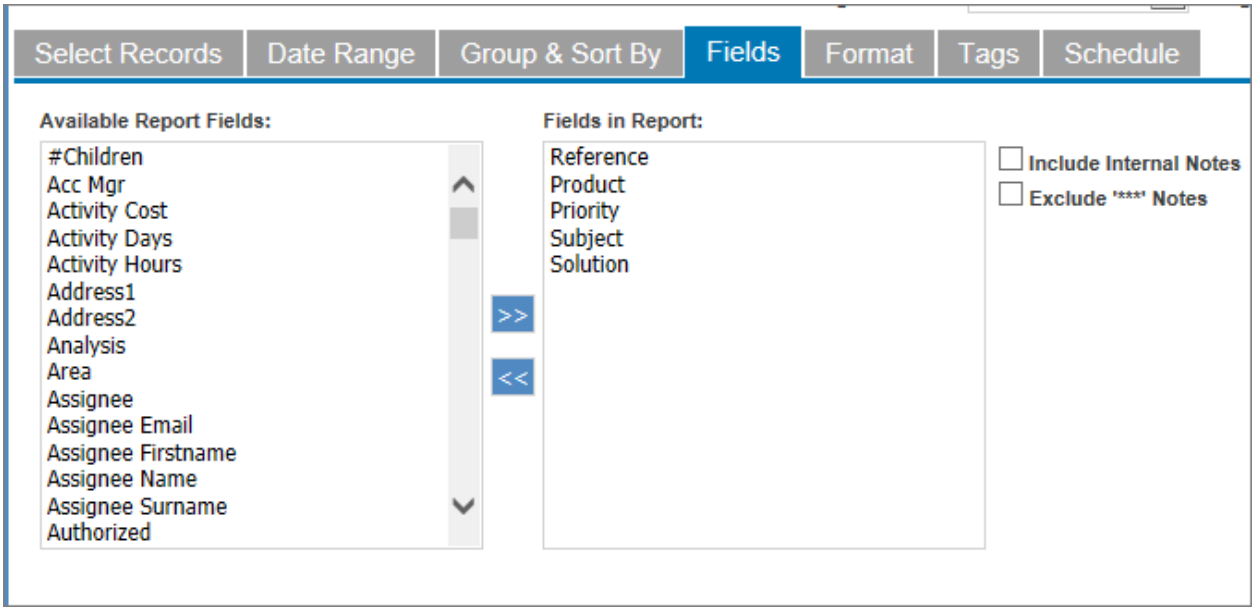
The first two sort fields are used as sub-headings to break up the report. The other sort fields are only printed if they have also been specifically included in the detail line.

4. QuickReport Designer, Fields Tab



Web UI



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Fields in Report	Make your selection from the alphabetical list of available report fields. Use the arrow buttons to transfer the fields to the fields in report list. Extra fields are also included suffixed by (Extra). You can use the field definition in the data dictionary to reduce the width of the field or indicate that values are to be accumulated. If you accumulate certain fields such as elapsed time the average rather than the total elapsed time is calculated.
Incl. Internal Notes ☑	Tick the box if call notes marked as internal use only are to be included.
Exclude * Notes** ☑	Tick to exclude system added notes which are prefixed with "XXX"

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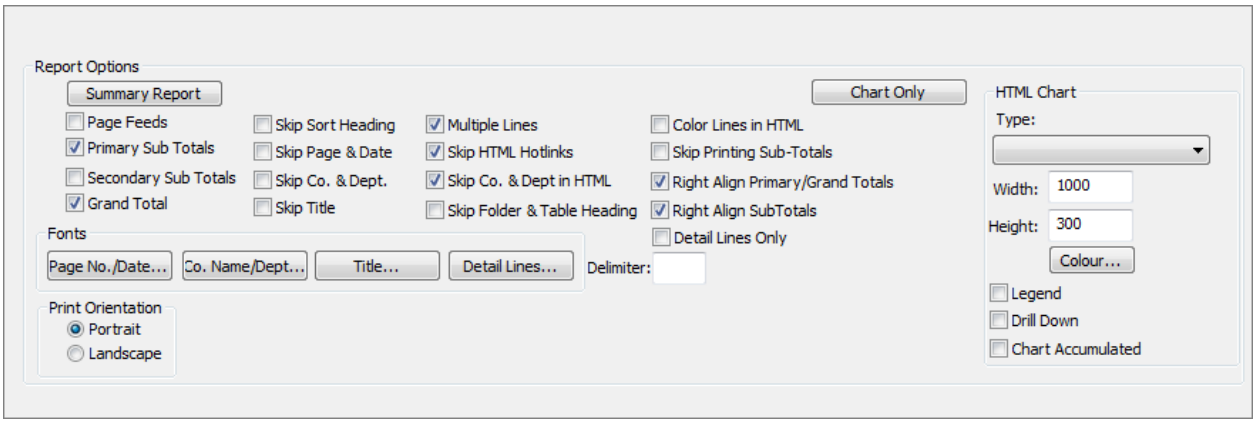
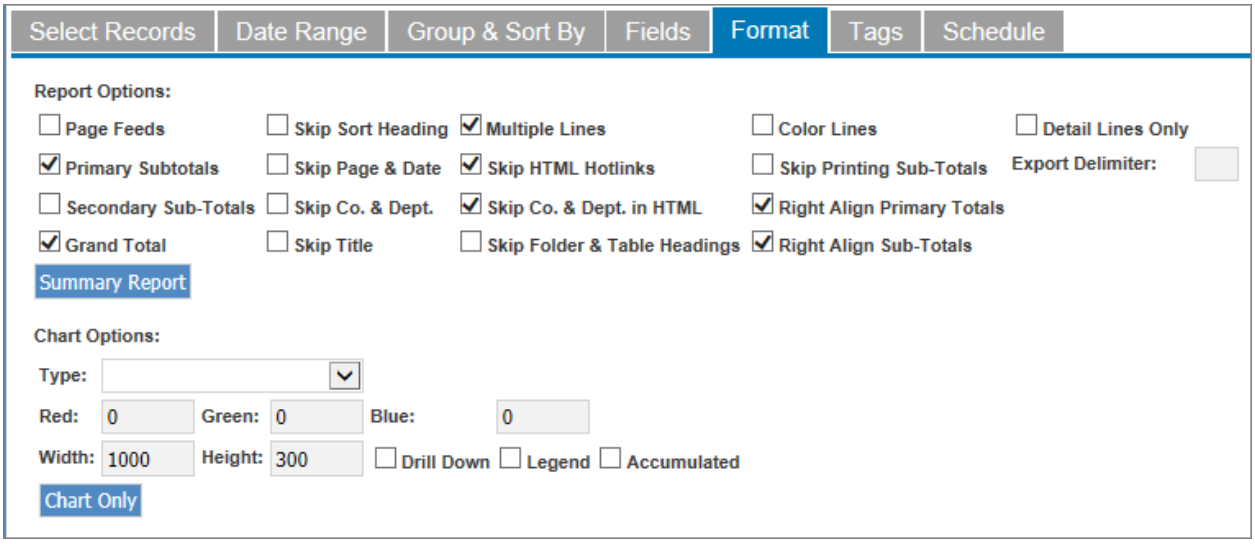
5. QuickReport Designer, Format Tab



Web UI.



Report Options	Use the check boxes to specify page throw and sub totalling.
Page Feeds ☑	Tick to have a page throw after a change of the primary sort key (this is the first entry in the Sort Order box).
Primary Sub Totals ☑	Tick to sum records within each primary sort key. If the call fields elapsed time, cost and job time are included in the report, they are also summed, as are any other call field marked to be accumulated in the data dictionary.
Secondary Sub Totals ☑	As above, except apply to secondary sort field.
Grand Total ☑	Tick to state the number of records and totals of sub-total fields.
Skip Sort Heading ☑	To ignore the heading break at change of primary sort key.
Skip Page & Date ☑	To not print the page and date heading at the top of each page.
Skip Co. & Dept. ☑	Tick to not print the company name and department name heading at the top of each page.
Skip Title ☑	Tick to not print the report title in the heading at the top of each page.
Multiple Lines ☑	Tick to print large fields, such as subject, in a block. The width of the block is determined by the Quick Reports width set in the data dictionary.
Skip HTML Hotlinks ☑	No fields in the report (such as call reference) will have HTML hotlink access.
Skip Co. & Dept in HTML ☑	Suppress these fields from HTML output
Skip Folder & Table Heading ☑	Suppress these fields from the output

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Skip Printing Sub-Totals ☑	Suppress these fields from the output
Right Align Totals ☑	Tick to print totals on the right hand side
Right Align Sub-Totals ☑	Tick to print sub-totals on the right hand side
Summary Report	This button, once pressed will amend the report settings and cannot be undone. The output will be a tabular report of the sort field sub-totals
Chart Only	This button, once pressed will amend the report settings and cannot be undone. The output will be a visual display of the prime sort field sub-totals. You can choose the chart style from the HTML Chart Type.
HTML Chart Type	When producing a chart you can choose between 3D Pie, Pie or Vertical bar. Use the Height and Width settings to define the size of the chart and Colour to specify the colour of the chart.
Legend ☑	Tick to show legend in Chart area.
Drill Down ☑	Tick to enable Drill down function to show report filtered on the criteria that has been clicked.
Chart Accumulated ☑	Tick to obtain chart of the accumulated values in the report.
Fonts	Click any of the Fonts buttons to transfer to the standard Windows font dialogue. You can change the fonts for Page No & Date, Co. Name & Dept, Title and Detail Lines. The changes made are global settings and affect all printed reports. (Reports can only be printed when using menu rather than ribbon options.)
Orientation ◉	Select either of the radio buttons Portrait or Landscape.

6. QuickReport Designer, Tags Tab

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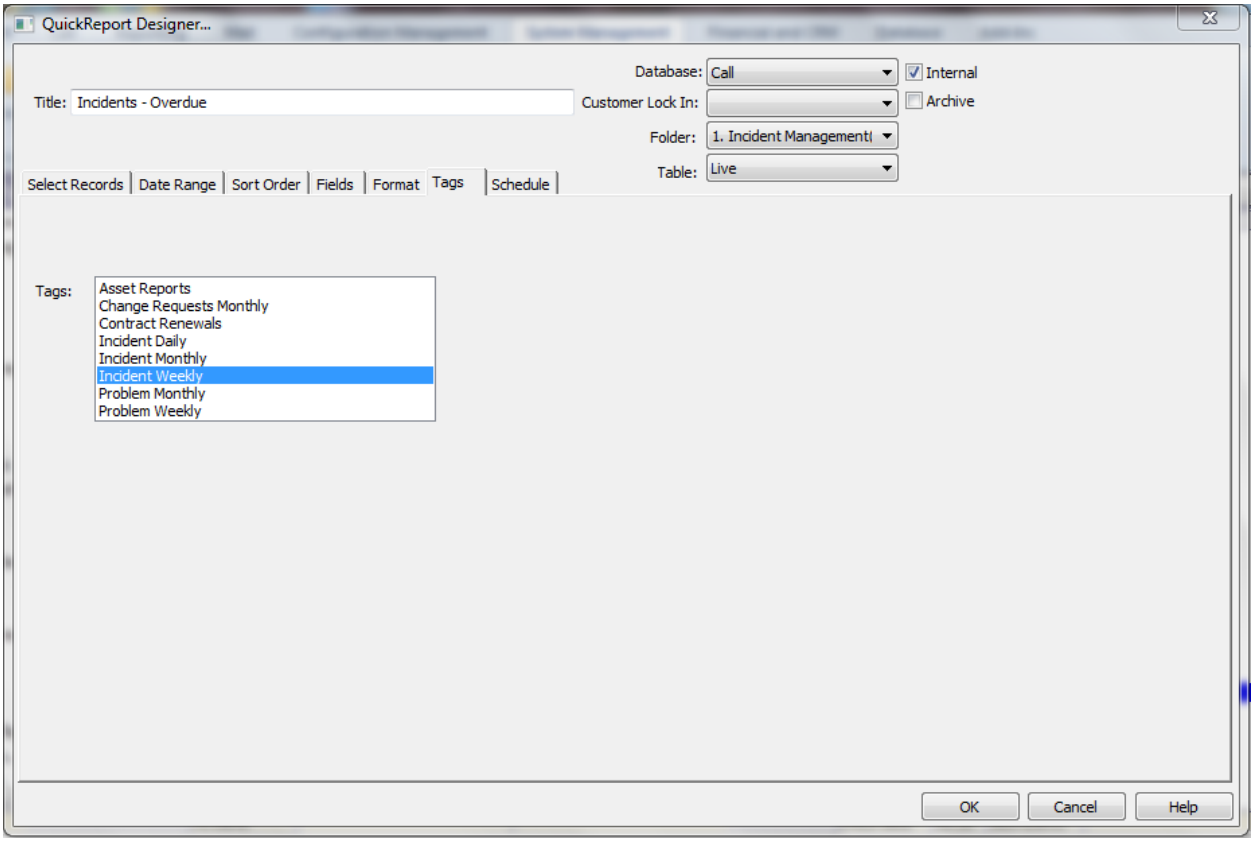
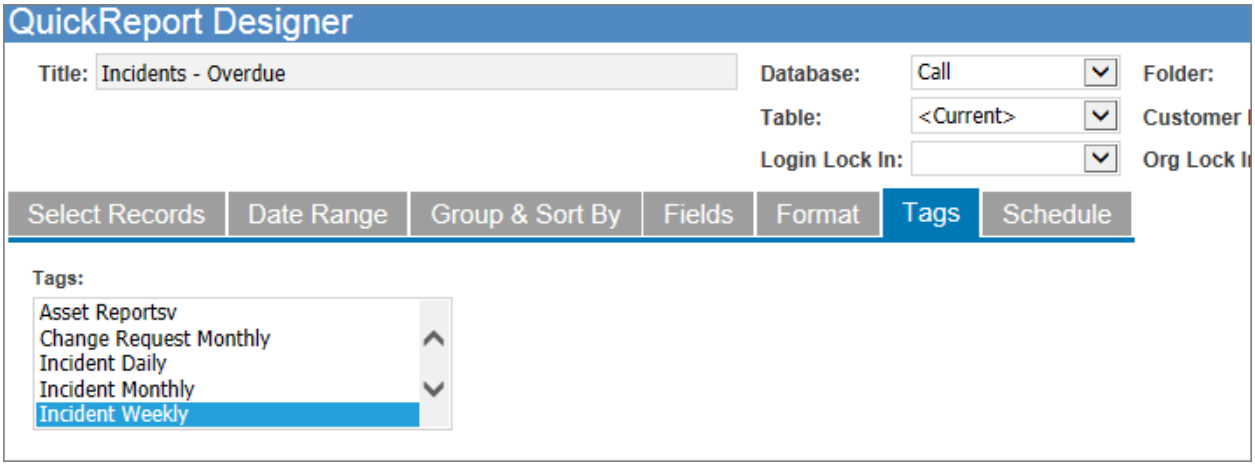
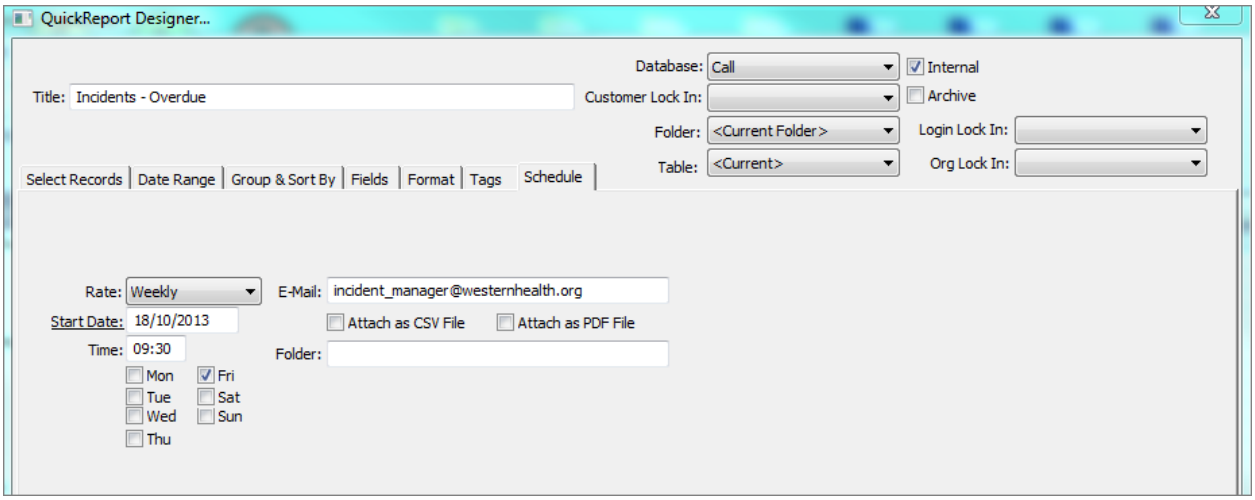
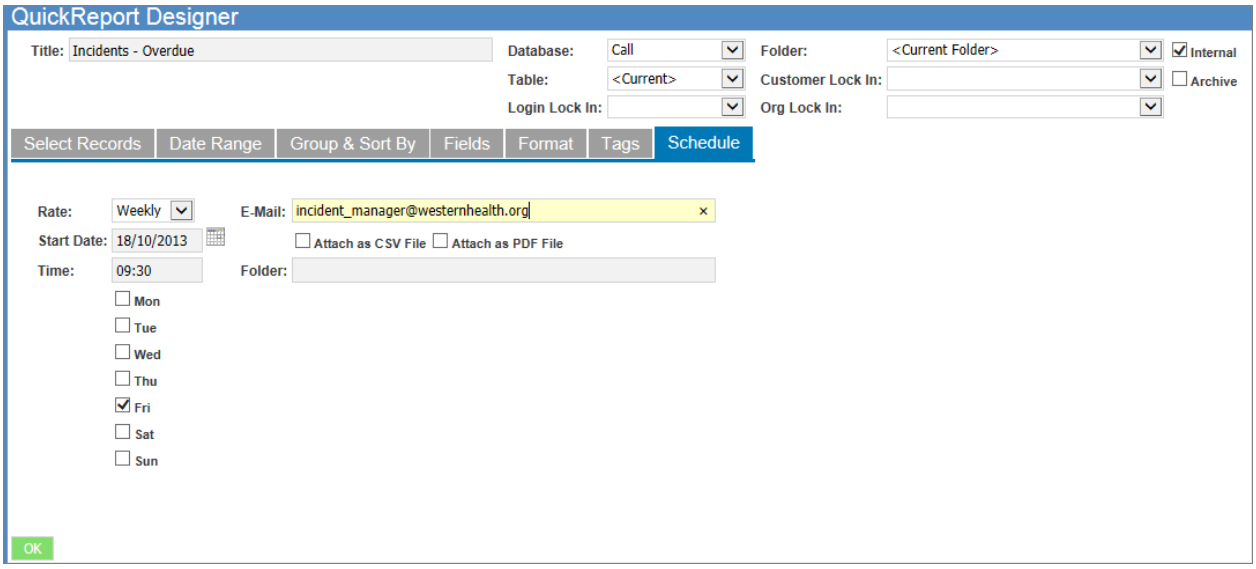




Tags are defined on the System Menu Ribbon. You can use the tags to group together like reports. There will be further development to this feature.

7. QuickReport Designer, Schedule Tab





Rate	Select the rate from the drop down.
Email	Enter the email address the report output is to be sent to.
Attach as CSV	Tick if the report is to be sent as a CSV.
Attach as PDF	Tick if the report is to be sent as a PDF file.
Start Date & Time	Enter start date and time and tick days boxes as required.
Days settings	The day settings work in conjunction with the rate in the following way. Daily – will be sent on the days flagged. Weekly – will be sent on the days flagged. Monthly – will ignore the days but be sent on the equivalent date of each month. Quarterly – will ignore days and sent 3 months hence from the start date, and 3 months hence there after.

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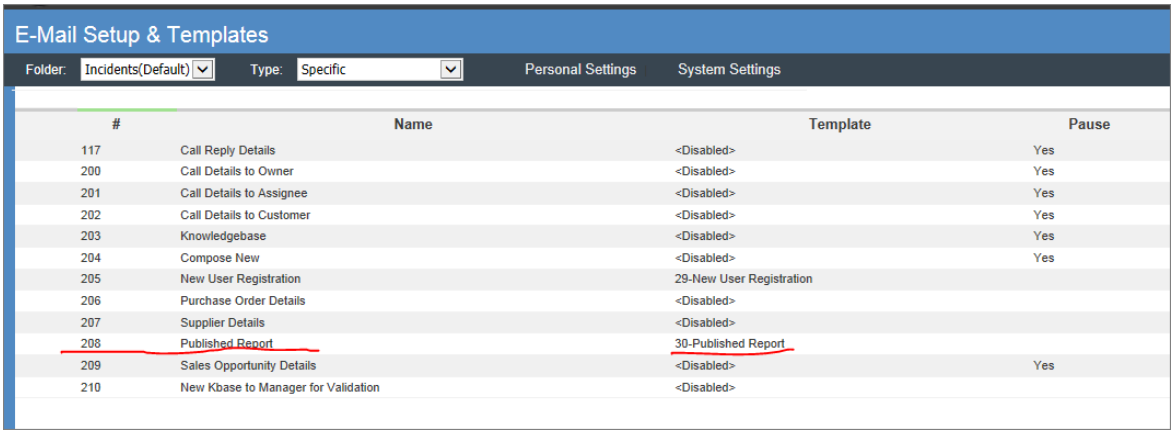
If you wish to schedule the report enter a rate and fill in the required email addresses. You also have to configure the Email option and use the Work Flow Engine.
NOTE. If a report is to be scheduled please ensure that that none of the tabs have the “Prompt” option set as this will prevent the report from running.

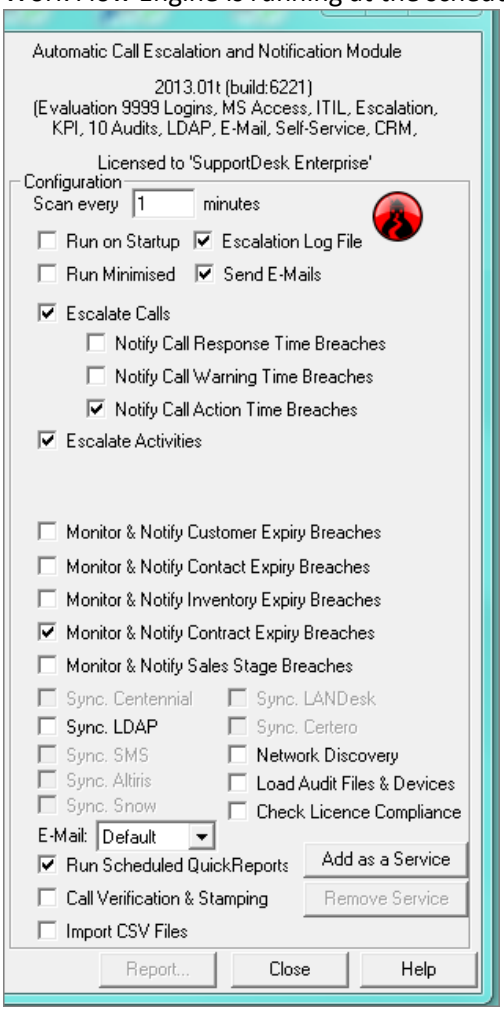
E-Mail.
Enable the ‘Published Report to Subscriber’ email template on Email Setup & Templates on the Specific tab.(ensure that this is done in all Folders for which reports are to be generated)



#	Name	Template	Pause
117	Call Reply Details	<Disabled>	Yes
200	Call Details to Owner	<Disabled>	Yes
201	Call Details to Assignee	<Disabled>	Yes
202	Call Details to Customer	<Disabled>	Yes
203	Knowledgebase	<Disabled>	Yes
204	Compose New	<Disabled>	Yes
205	New User Registration	29-New User Registration	
206	Purchase Order Details	<Disabled>	
207	Supplier Details	<Disabled>	
208	Published Report	30-Published Report	
209	Sales Opportunity Details	<Disabled>	Yes
210	New Kbase to Manager for Validation	<Disabled>	

Workflow Engine

In the Work Flow Engine you need to tick both Send E-Mails and Run QuickReports and ensure that the Work Flow Engine is running at the scheduled time.



Examples

1. List of Overdue Incidents

This is the output of the report parameters in the previous screen shots.

Incidents - Overdue

(-)

Live Calls

Assignee: Dell

Reference	Open Date	Action Date	Type	Status	Priority	Subject
IM000003	14/03/2010	26/04/2011	Hardware	Open	4. Long Term	My laptop is overheating and rebooting several times a week.

1 Call for 'Dell'

Assignee: RachelD

Reference	Open Date	Action Date	Type	Status	Priority	Subject
IM000009	15/03/2010	26/03/2010	Software	Open	3. Low	Email is very slow to respond before lunch.

1 Call for 'RachelD'

Assignee: ServDesk

Reference	Open Date	Action Date	Type	Status	Priority	Subject
IM000006	14/03/2010	19/03/2010	Software	Open	2. Medium	Internet produces error code 1234 when attempting to print any report. Please see attached.
IM000010	15/03/2010	20/03/2010	Hardware	Open	2. Medium	My PC won't start up at all today... I could really do with a new one!
IM000011	15/03/2010	26/03/2010	Software	Open	3. Low	Forgot Password
IM000012	15/03/2010	26/04/2010	Software	Open	3. Low	Forgot Password

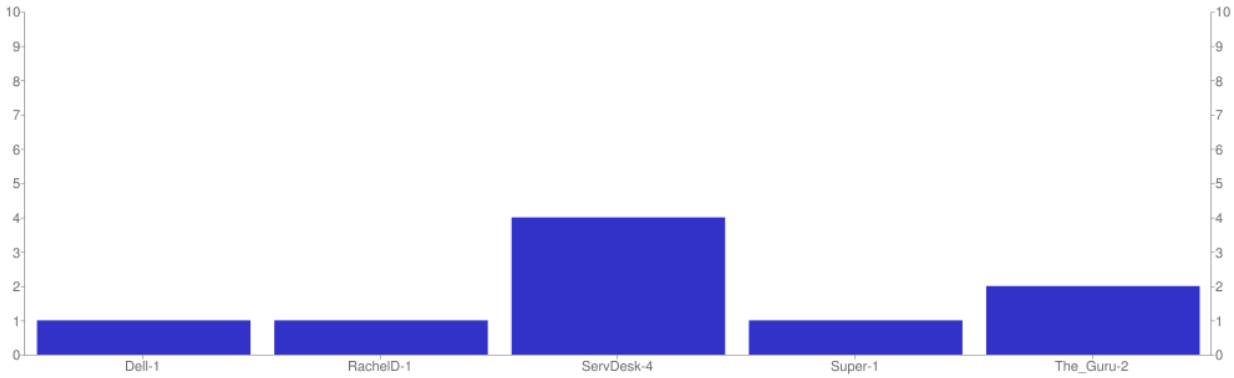
With appending chart…

Assignee: The_Guru

Reference	Open Date	Action Date	Type	Status	Priority	Subject
IM000004	14/03/2010	14/03/2010	Hardware	Open	0. Critical	Printer is stuck repeating a payroll print job with extremely sensitive information on it.
IM000013	16/03/2010	19/03/2010	Software	Open	1. High	Cannot send or receive email

2 Calls for 'The_Guru'

9 Calls in Total



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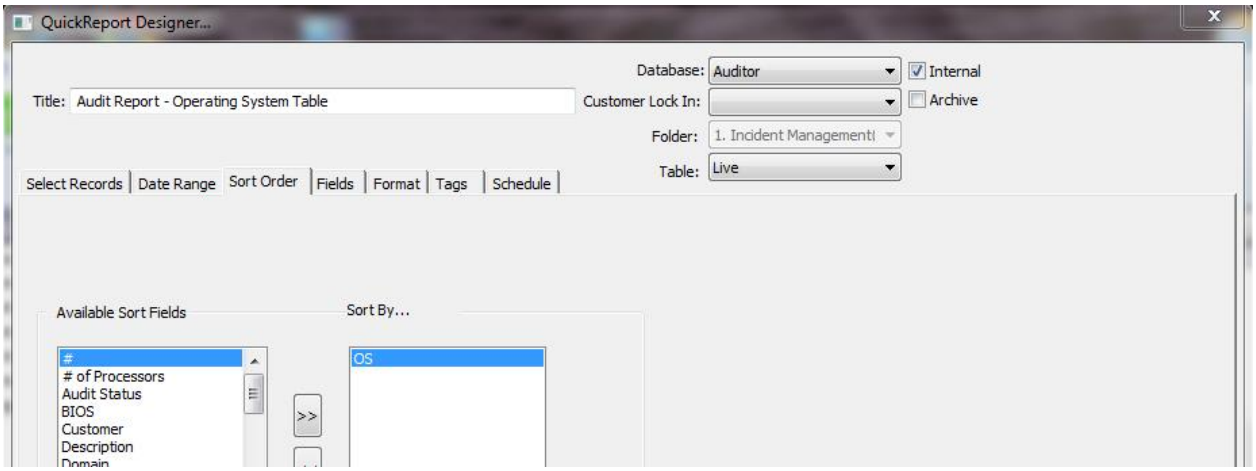
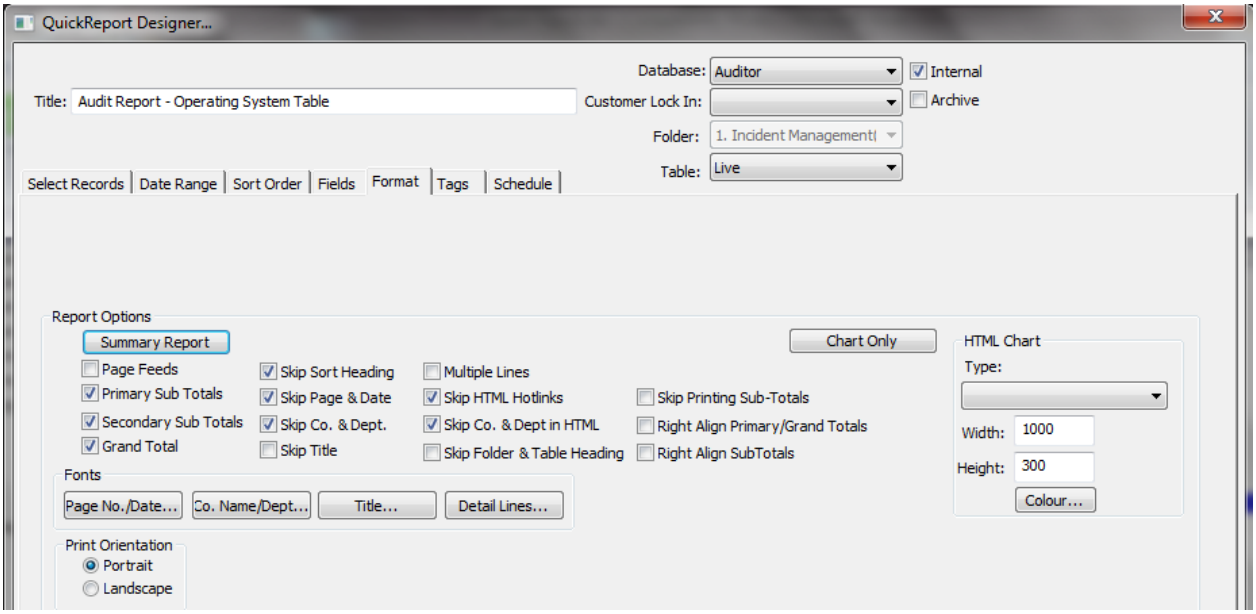
2. Summary of Assets

This is an example of a tabular report to show the various operating systems in use on PC's.

This report requires the PC Audit and Discovery option as the report uses the Auditor database table.

Sort the report by Operating System (OS) and click Summary Report button on the Format tab to produce the table below.





Audit Report - Operating System Table

(-)

OS	Total
Microsoft Windows 2000 Server	1
Microsoft Windows 7 Ultimate	1
Microsoft Windows XP Professional	2
Microsoft® Windows Vista™ Business	2
Microsoft® Windows Vista™ Ultimate	1
Grand Total	7

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