

Build [Reports](#) and Do [Searches](#) With CCS Service Request and Exchange Public Folders

CCS Service Request tickets provide a rich data store about Service Request activity and past and current issues. There are many ways to take the advantage of this rich repository of information, several of which are discussed below.

Reporting

To track the progress of tickets, see how many are still open or closed, or produce daily, weekly and monthly reports, we provide **Report Builder** in the Reports folder. This allows you to export ticket data to an Excel spreadsheet or comma-delimited Text file. You may also want to use [Crystal Reports](#), which can produce comprehensive and stylish reports from Microsoft Exchange and Outlook data sources.

Report Builder will extract all fields from a ticket or you can select which fields to export. Also, you can filter by date or completion status. For instance, if you wanted to do a Weekly Report of tickets completed, you might select the fields "Ticket ID, Summary, End User, Date Received, Status" and Filter by Status of "Completed" with a Date Range of "7 days". This will create an Excel spreadsheet or Text file with all tickets that were received and completed in the last week.

REPORT BUILDER

Name of Report:
Report Builder

Folder to export:
Assigned Tickets Change Folder

Fields to export: Select all

General Fields

Summary

Folder

Ticket ID

Ticket No.

Case ID

Category

Type

Assigned To

Assigned by

Status

Priority

Total Work

Percent Complete

Location

Room

Contact Fields

End user

Company

Office

Department

Phone

Email

Additional Contact Name

Additional Contact Email

Date Fields

Date Received

Date Assigned

Date Last Modified

Date Completed

Start Date

Due Date

Details Fields

Project Code

Billing Information

Elapsed Time

Related Tickets

Vendor Case ID

Ticket source

Created By

Custom Fields

Field 1

Field 2

Field 3

Field 4

Logs and Resolution

Description Work Log

Has attachments? Cause

Resolution

Export to: Excel Displays an Excel spreadsheet.

Export to: Email Address Email To: Select

Export to: File File Path (txt, htm, doc, or pdf) ...

Optional Filters

By Status: All

By Priority: All

By Date Range:

Date field to use in filter: Date received

All dates Past 7 days Past 30 days

Month to date Year to date

Specific Date Range 7/1/2008 To 7/31/2008

(Words like Now, Yesterday, One week ago, etc., can be used in these boxes.)

Filter On Specific Fields

| Field | Value |
|-----------------------------------|-------|
| <input type="checkbox"/> Field 1 | |
| <input type="checkbox"/> Field 2 | |
| <input type="checkbox"/> Field 3 | |
| <input type="checkbox"/> Field 4 | |
| <input type="checkbox"/> Field 5 | |
| <input type="checkbox"/> Field 6 | |
| <input type="checkbox"/> Field 7 | |
| <input type="checkbox"/> Field 8 | |
| <input type="checkbox"/> Field 9 | |
| <input type="checkbox"/> Field 10 | |

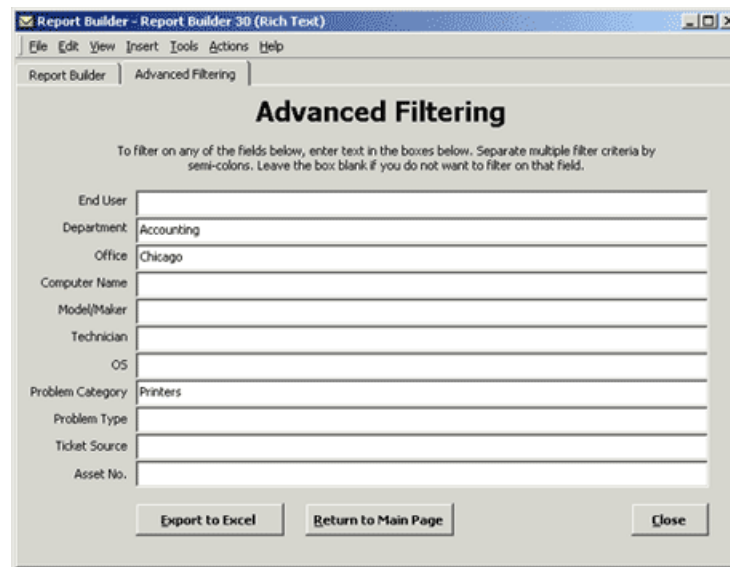
See "Filtering Instructions" tab on this form for details on filtering by Specific Fields.

Close

There are many other ways to use **Report Builder**. For instance, you can easily switch folders with the "Change Folder" button and export tickets from another folder. You can filter on Open, Completed, or Overdue tickets. You can set any date range and decide what date field to use in the filter.

In version 4.0, you can create a report and then save it by giving it a name, then going to File/Save. This will put it into your Drafts folder. You then drag-and-drop it from the Drafts folder to the Reports folder. This "report template" will now be available for future use at any time. Outlook Service Request comes with several report templates already in the Reports folder.

On the Advanced tab, you can use 11 other fields to filter the reports. For instance, if you want to see all tickets for only one user, you can enter that name on the End User line and only tickets for that user will be exported. You can use Problem Category and Type in the same manner. This allows you to very easily do highly custom reports like "Which tickets involved printers in the Accounting department in Chicago last month?"



The screenshot shows a window titled "Report Builder - Report Builder 30 (Rich Text)" with a menu bar (File, Edit, View, Insert, Tools, Actions, Help) and two tabs: "Report Builder" and "Advanced Filtering". The "Advanced Filtering" tab is active, displaying a form with the following fields and values:

| Field | Value |
|------------------|------------|
| End User | |
| Department | Accounting |
| Office | Chicago |
| Computer Name | |
| Model/Maker | |
| Technician | |
| OS | |
| Problem Category | Printers |
| Problem Type | |
| Ticket Source | |
| Asset No. | |

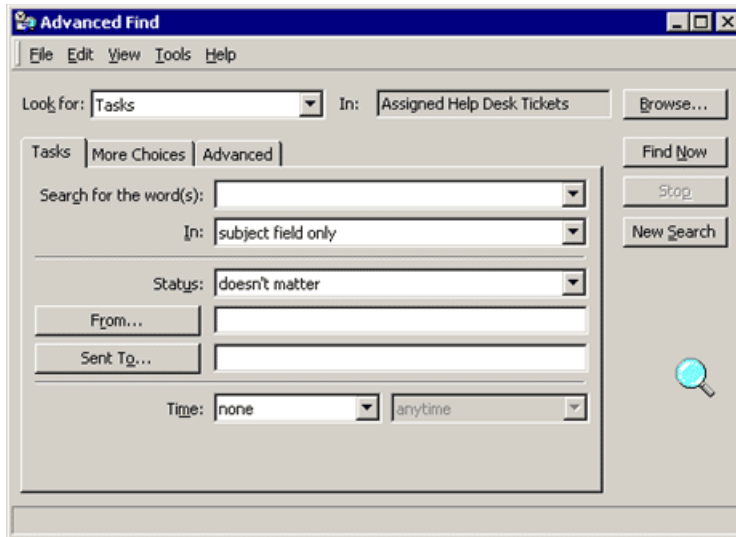
At the bottom of the dialog, there are three buttons: "Export to Excel", "Return to Main Page", and "Close".

Searches

The Tickets are in Exchange public folders that can be searched using Outlook's Find and Advanced Find features, as well as any third-party tool that can read the Exchange database. To use Outlook's Find, simply go to Tools/Find. This provides a basic search.

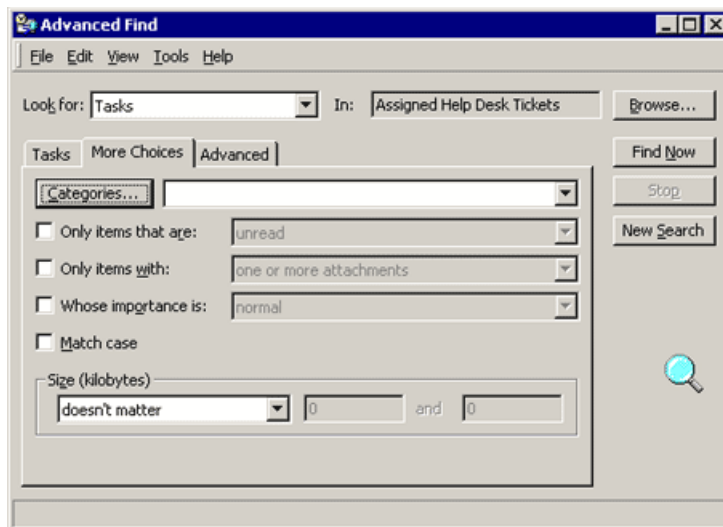
Advanced Find has much more functionality. To activate, go to Tools/Advanced Find. This Outlook utility has many options which allows you to build very exacting searches. Searches can be saved with the File/Save Search option. The searches are saved as *.oss files. They can be used for later searches by going to File/Open Search in Advanced Find.

First, choose "Tasks" in Look For:, then Browse to the folder you want to search.

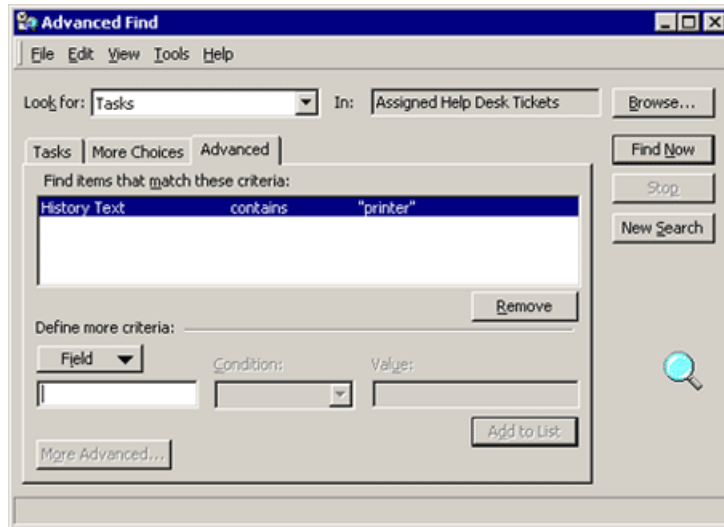


On the first screen, you can search for specific words in the subject (Summary) and notes (Description) fields, while also choosing Status, From, To, and Time.

The second tab gives you more choices:



The third tab provides very specific searches and is very useful for searching the custom fields on the Service Request Tickets, such as Problem Category or History Text (History Log). The trick here is to use the "Fields" dropdown list and choose "Assigned Service Request Ticket" to see the list of fields available.



Advanced Find can produce very capable and exact searches. You can use it on a Tickets folder to find past issues and important data quickly.

Another way to find Tickets that meet certain criteria is to set a Folder View with a Filter to show only those tickets that meet the Filter criteria. Placing a filter on a folder view is like Advanced Find in that a restricted list of tickets is returned. The difference is that Advanced Find will display the tickets in a list in the Advanced Find utility whereas Filter will show the tickets in the Folder View. See [Folder Views](#).