Remedy Reporting

** These steps assume that a Report Style has already been created and saved.

1. Open the Help Desk Form in SEARCH MODE by clicking <**Search for Request**> on the CONSOLE.

2. Under CATEGORY, select Telephone Services.
   If you want a more refined search, enter more selection values on the screen. (Type, Item, Status, etc) You can also use the Advanced Search bar. I.e. 'Status' < "Resolved". The Advanced Search bar is found under **VIEW → Advanced Search Bar.** To select certain fields to search on, Click FIELDS at the right of the search criteria bar, then select Fields. From the list of fields presented, select the one you want, then the OPERATOR, then enter the VALUE, enclosed in " ". You can select a value for the field from a list if the field is a drop down list field. Do this by clicking FIELDS… SELECTION VALUES and then the field that you are searching on. The list of Values allowed are shown. Select one.
   You may search on multiple fields by stringing them with 'OR' or 'AND'.

   If you enter NO criteria at all, you will return ALL tickets in the system.

3. Press the <**Search**> button at the bottom of the screen.

4. A list of tickets matching the search criteria are returned in the top pane of the screen with the first ticket selected. To select all tickets returned, scroll down to the last ticket in the list and while holding the <SHIFT> key down, click the left mouse button. All records from your search should now be highlighted.

5. With all the records now selected, in the top menu tool bar, click **TOOLS**, then select **Reporting**. A menu list of Report Styles is shown. Select the report you wish to run for the records selected. i.e. Telecomm – Department Land Line.

6. With the report style highlighted, click on the **magnifying glass icon** in the lower tool bar to **Preview** the report.

7. If you want to **Print** this report, click the Printer icon.

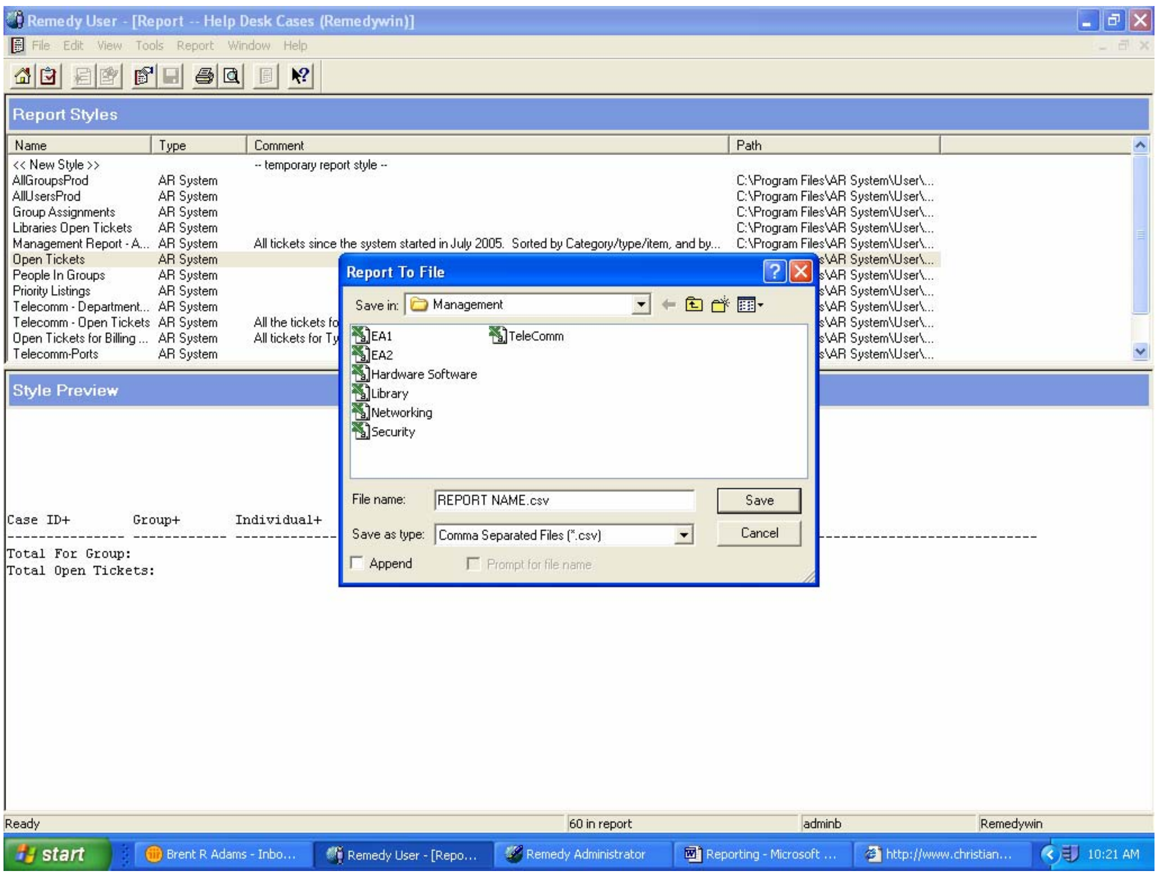
8. You may return to Step 2 if you wish to change the selection criteria and have other data on the report.

Exporting Data to EXCEL

9. If you want to Export the data to a file, to be loaded to another application such as EXCEL, instead of performing Step 6 and 7, do the following:

10. From the **Report** menu in the top toolbar, select **Export To**, then **File**.

11. In the **Report to File** dialog box, enter the Save in: location you want the file saved to, give it a file name, and select the type of file (Comma Separated File (*.csv) then click <**SAVE**>.

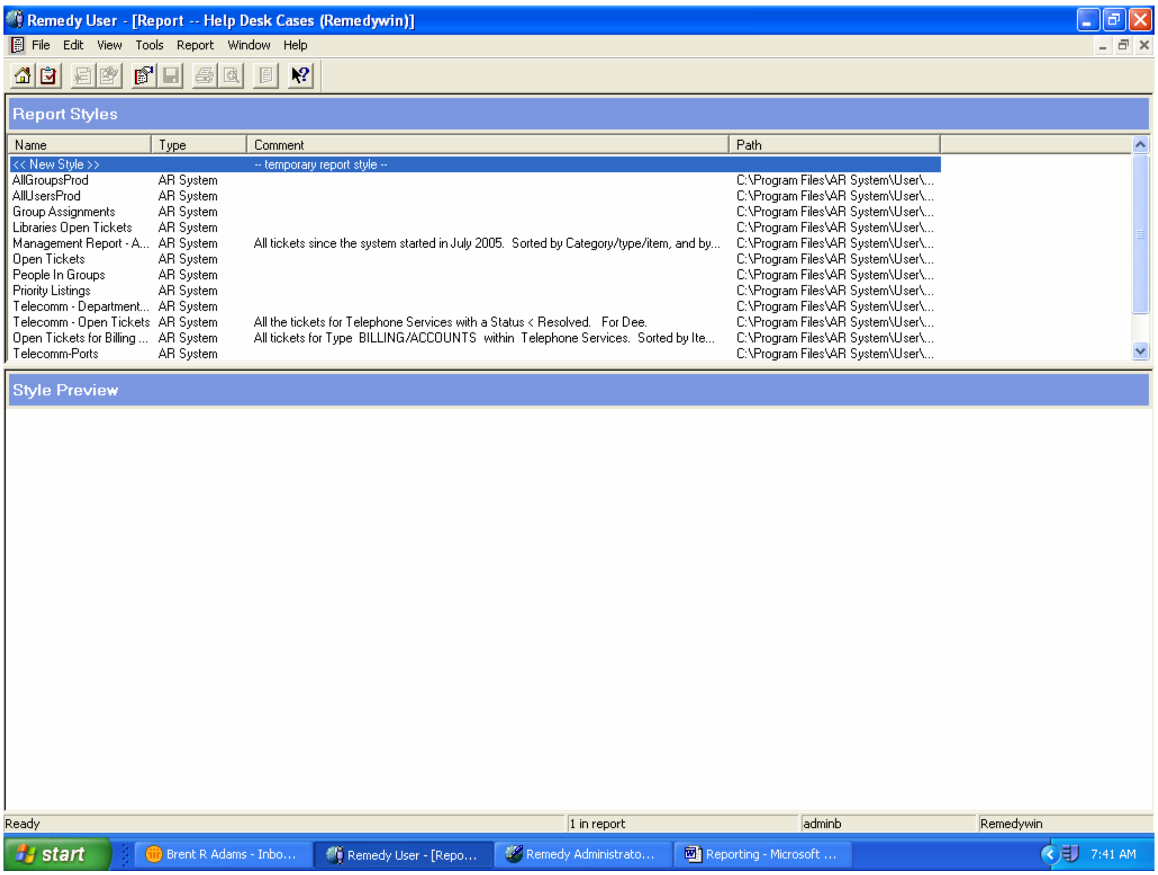


12. When you open EXCEL, select this file to Open. The file will be loaded into a spreadsheet with each field from the report in a column, and each record on a new row.

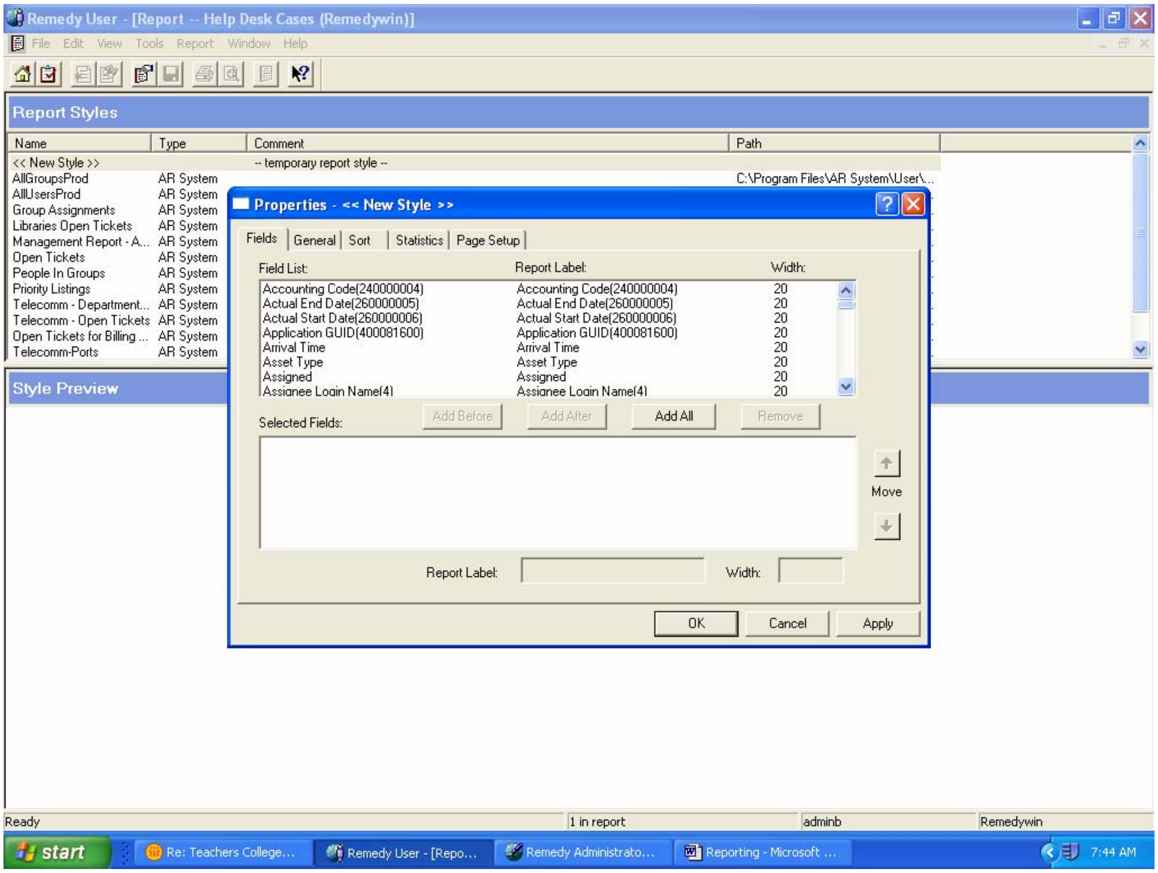
Creating a Report Style (Definition)

1. Open the Help Desk form in SEARCH MODE by clicking <**Search for Request**> on the Console.

2. On the Tool Bar under **TOOLS** select **Reporting**… This opens the Report Style form. Existing Styles show in the top pane. The bottom pane is where the layout of the report will show once a style has been selected.



3. To create a new report style, double click on << New Style >> at the top.
   The Properties box will open. Fill in all the data to create a new report definition. Click APPLY after each change to show what affect your definition is having on your report, and to keep your definition up to date as you create it. DO IT OFTEN. This isn't the same as SAVE, but close.



4. Fields tab:
   Select the fields you want to display on your report by double clicking them from the selection menu.

Case ID+	The Case Number
Category*	Category
Type*	Type
Item*	Item
Group+	Group Assigned
Individual+	Individual Assigned
Login*+	Requesters Login
Name*+	Requesters Name
Priority*	
Status*	
Summary*	Short Description

   Position the fields in the order you want them displayed on the report.

5. General Tab

   Name your Report. Pick an descriptive name that will tell you what the report is about. You can also type in a comment which will show in the Report Styles list.

6. Sort Tab

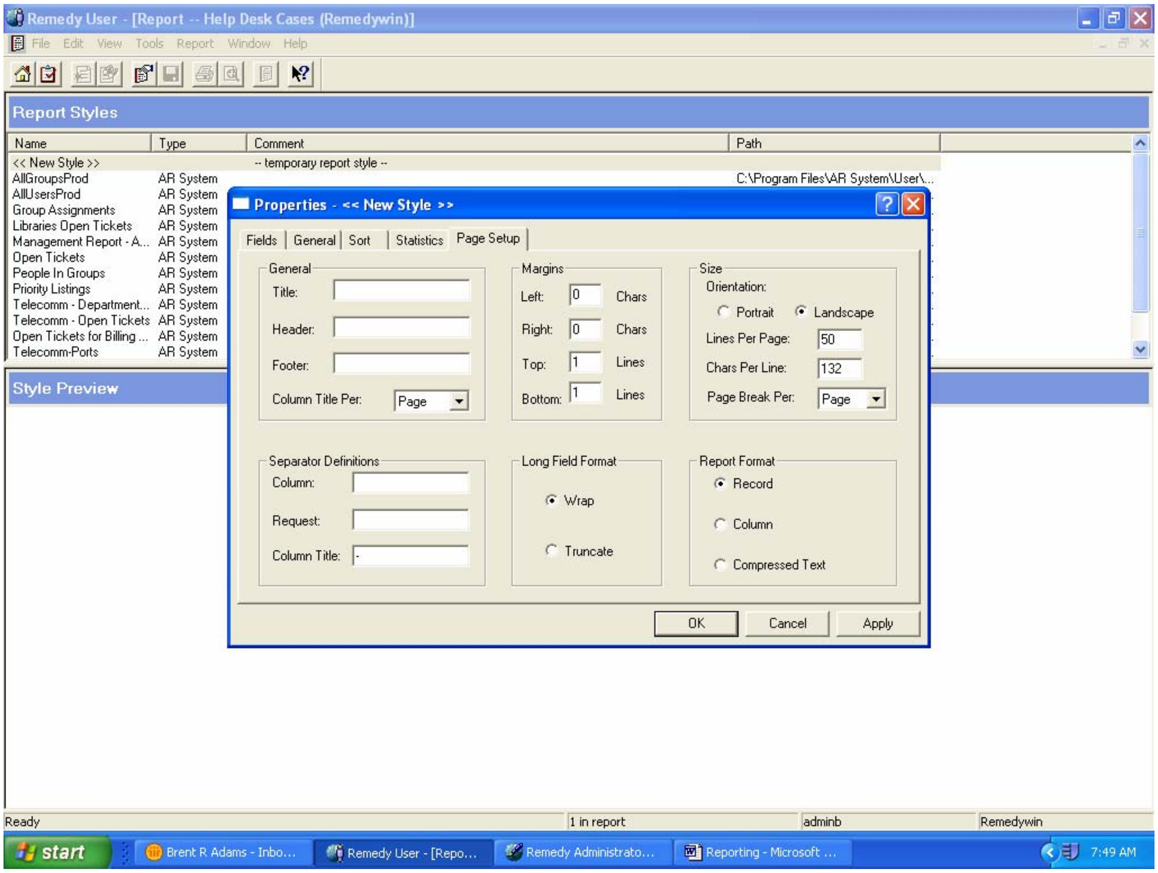
   Information in this section allows you to Sort your report in a way that makes sense to you. The Groupings done here also allow for totaling, getting counts, etc, on the STATISTICS tab. Select Fields from the drop down list, and select how you want them sorted, and grouped.

7. Statistics Tab

   This is where you define how you want totals calculated and displayed on your report. 'Counts' tallies the number of requests in that section. Sum adds up specified field values, average calculates the average. All operations except COUNT must be applied to numeric fields only.
   The Expression field is required for all operations except Count. You can display a Count for all fields you have Grouped on in the SORT tab.
   You can define a Label to show on the report beside the Statistic you are creating.
   Compute On will give you a drop down list of all fields you selected to GROUP on in the SORT tab. If you have not selected any fields to group on, this Compute On list will only let you select Report.
   Layout lets you select Single Line, Multiple Line, or Column to display your statistics. Single line displays all statistics on ONE LINE.
   Multiple Line displays each statistic on it's own line. Column places the statistic in the column that it references.

8. Page Set-Up Tab

   Enter a Title for the Report. This will display at the top of the first page. The Header and Footer entries will be placed on each page of the report. You can chose to put the Column Headings on each page, or not at all with the 'Column Title Per' field. The Separator definitions define what characters will be used to separate columns, column headings on the report, or one record from the next if the format is by request.
   In the SIZE area, you can select the page to print landscape or Portrait style, the line length for each style, the number of lines on a page for each, and how you want pages broken, by record, or by page length.
   You can format the report by one record at a time, with all the fields then being listed down the left side of the page, or by column, which arranges each record as a line on a report. Long field format allows you to define what you want to happen to fields that are longer that the column space you allowed in your layout on the first tab.



9. To save the Report Definition (Style) click on the DISKETTE icon on the toolbar or under the Report drop down menu select SAVE. Give it a descriptive name again! It will be saved to your arcmds folder and will show up in the upper Report Styles pane of the Reporting window.

10. If you want to PREVIEW the report with your data in it, click on the MAGNIFYING glass in the tool bar.

Creating Macro's to Run Reports

1. From a good starting point.. such as the Support Console, select from the ToolBar…. TOOLS → Record Macro.
   This will start recording ALL keystrokes from this point forward.

2. Practice the entering the search criteria to be sure you get the results you want before you begin this process.

3. Click on SEARCH for Request.

4. Enter the search criteria you will want searched for over and over on a regular basis and then press <Search>.

5. Follow the steps for running a report, including selecting the records to include, the Report Style to use, even the PRINT or PREVIEW buttons on the TOOL BAR.

6. Go to TOOLS → Save Macro. Give the macro a name that is descriptive to you for what it does. It will be saved in the arcmds folder.

7. To RUN the macro at any time, go to TOOLS → Run Macro, and select the macro you want to run from your saved list.