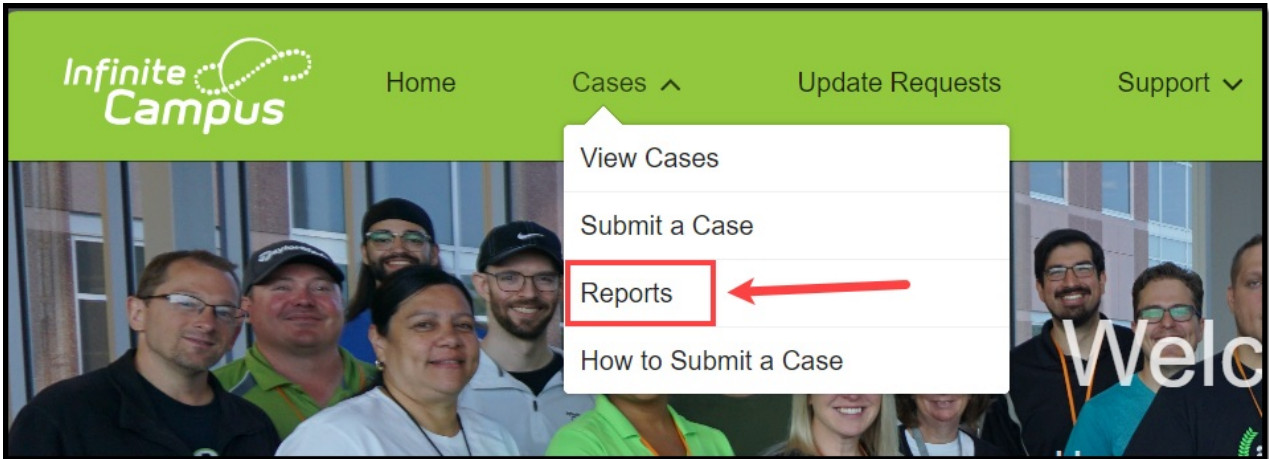


# Reports (Cases)

Last Modified on 09/30/2024 2:04 pm CDT

[Report Layout](#) | [Filters](#) | [Exporting Reports](#)

The **Reports** area allows support contacts to pull and export case information. This is found under Cases > Reports.



The following reports are available:

- **All Cases** - All district cases, including **Closed**
- **All Idea Cases**- All cases submitting enhancement requests
- **All Open Cases** - All district cases that are currently **Open**
- **All Closed Cases** - All district cases that are currently **Closed**
- **All Open Issue Cases** - All cases with a Status of **Assigned to Development**
- **All Closed Issue Cases** - All cases with a Status of **Available in Release**.
- **All Pending Cases** - All cases awaiting a customer response including **Pending Customer Input** and **Pending Customer Verification**

Name	Description
All Cases	All cases, including closed cases.
All Idea Cases	All idea/enhancement requests submitted by the district.
All Open Cases	All cases that are currently open.
All Closed Cases	All cases that are currently closed.
All Open Issue Cases	All cases with a status of assigned to development.
All Closed Issue Cases	All cases with a status of Available in Release.
All Pending Cases	All cases waiting for a response.

## Report Layout

Click on a report's name to view it. All reports contain the same headers by default.

Header	Description
<b>Total Records</b>	Displays the number of cases included in the report.
<b>Case Number</b>	The record's unique identifier. Click to open the case record.
<b>Date/Time Opened</b>	The day and time when the case was submitted.
<b>Case Date/Time Last Modified</b>	The day and time when an update was last made to the case details.
<b>Account Name</b>	Name of the district who submitted the case.
<b>Contact Name</b>	The Authorized or Technical support contact who submitted the case.
<b>Status</b>	The current state of the case in its life cycle.
<b>Case Record Type</b>	Categorization of the case chosen by the contact at its creation. Eg. Ask a Question.
<b>Priority</b>	The case priority level (Low, Medium, High, or Critical. Critical is reserved for outages.)
<b>Module</b>	The part of the Campus product that the case pertains to.
<b>Case Owner</b>	The Support resource working the case.
<b>Subject</b>	Title of the case. Click to open the case.
<b>Description</b>	The question being asked, explanation of the issue being reported, or details of the service request.
<b>Resolution</b>	Answer to the question asked, solution to the issue reported, or summary of services provided.

REPORT  
All Cases

🔍 🔄 ⚙️ Export

Total Records  
9

CASE NUMBER	DATE/TIME OPENED	CASE DATE/TIME LAST MODIFIED	ACCOUNT NAME	CONTACT NAME	STATUS ↑	CASE RECORD TYPE	MODULE	CASE OWNER	SUBJECT	DESCRIPTION	RESOLUTION
	6/26/2018 9:37 AM	12/21/2018 6:52 PM			Assigned	Training Request	Point of Sale	Lisa French-Austin	POS and FRAM training	We would like to schedule a live training with Lisa French-Austin on POS & FRAM.  First date selected: Fri Aug 03 2018 Second date selected: Thu Aug 02 2018 Third date selected: Mon Aug 06 2018	-

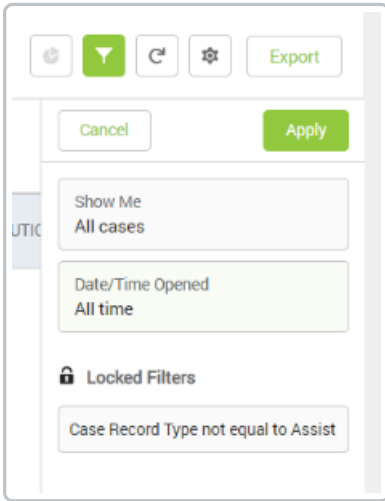
## Filters

**Filters** may be adjusted to include cases based on certain criteria. Some filters will be pre-selected and are locked.

To update the Filters:

1. Click on the **Filters** (funnel) icon.

2. Click on the **filter** to adjust.
3. Use the **dropdowns** to select the desired search parameter.
4. Click **Apply**.
5. Click the **Filters** (funnel) icon again to close the filters panel.



## Exporting Reports

Reports may be **exported** into formatted or details only reports:

- **Formatted Report** - Exports the report as it appears in the Portal, including headers, groupings, and filter details. Exports in Excel Format .xlsx.
- **Details Only** - Exports only the detail rows. Use this to do further calculations or upload to another system. Exports in Excel Format .xlsx, or as Comma Delimited .csv.

To export a report:

1. Click on the **Export** button.
2. Choose **Formatted Report** or **Details Only**. The option selected will be indicated with a green and white check mark.
3. If choosing Details Only, use the drop down to select the Format.
4. Click **Export**.

## Export

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### Export View

**Formatted Report**

Export the report as it appears in Salesforce, including the report header, groupings, and filter details.

**Details Only**

Export only the detail rows. Use this to do further calculations or for uploading to other systems.

Format

Excel Format .xlsx

Cancel Export