

## Reports

Last Modified on 05/25/2023 10:53 am CDT

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

Infinite Campus	Home	Cases 🔨	Update Requests	Support 🗸
		View Cases		
		Submit a Case	e	
		Reports	<u> </u>	
		How to Submi	t a Case	Welc

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

Infinite Campus	Home	Cases 🗸	Update Requests	Support 🗸	Training 🗸	Hosting Information $$	More 🗸	Portal User
The Reports area allows aut filtering.	horized contacts to	o view and export case i	nformation. All reports contain the	e same header row inforn	nation. To filter the report,	click on the report's name and then sele	ct Export, the report will exp	port to Excel for granular
Reports								
Name			Description					
All Cases			All cases, including close	sed cases.				
All Idea Cases			All idea/enhancement r	equests submitted by the	district.			
All Open Cases			All cases that are curre	ntly open.				
All Closed Cases			All cases that are curre	ntly closed.				
All Open Issue Cases			All cases with a status	of assigned to developme	ent.			
All Closed Issue Cases			All cases with a status	of Available in Release.				
All Pending Cases			All cases waiting for a r	esponse.				

## **Report Layout**

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



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

All Cases											
9	ecords										
CASE NUMBER	DATE/TIME OPENED	CASE DATE/TIME LAST MODIFIED	ACCOUNT NAME	CONTACT NAME	STATUS 🕇	CASE RECORD TYPE	MODULE	CASE OWNER	SUBJECT	DESCRIPTION	RESOLUTION
1040-123	6/26/2018 9:37 AM	12/21/2018 6:52 PM	Annya Mi Analasi Masa Masa	<u>1</u>	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 preselected 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.

C	C & Export
	Cancel
UTIC	Show Me All cases
	Date/Time Opened All time
	Locked Filters
	Case Record Type not equal to Assist

## **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						
port 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.					
mat ixcel Format .xlsx	•					
		Cancel				