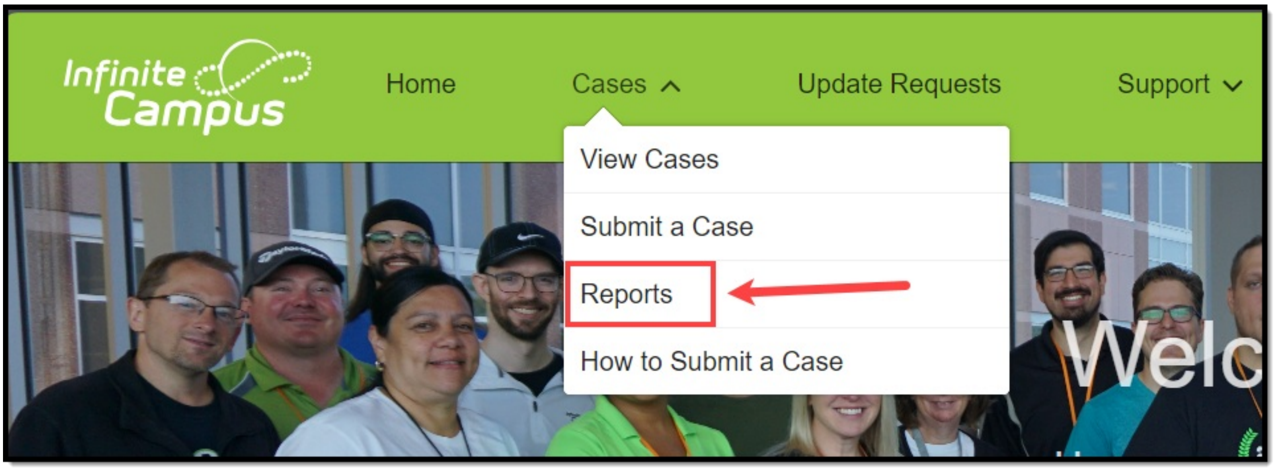
Reports

Last Modified on 09/14/2023 9:28 am CDT

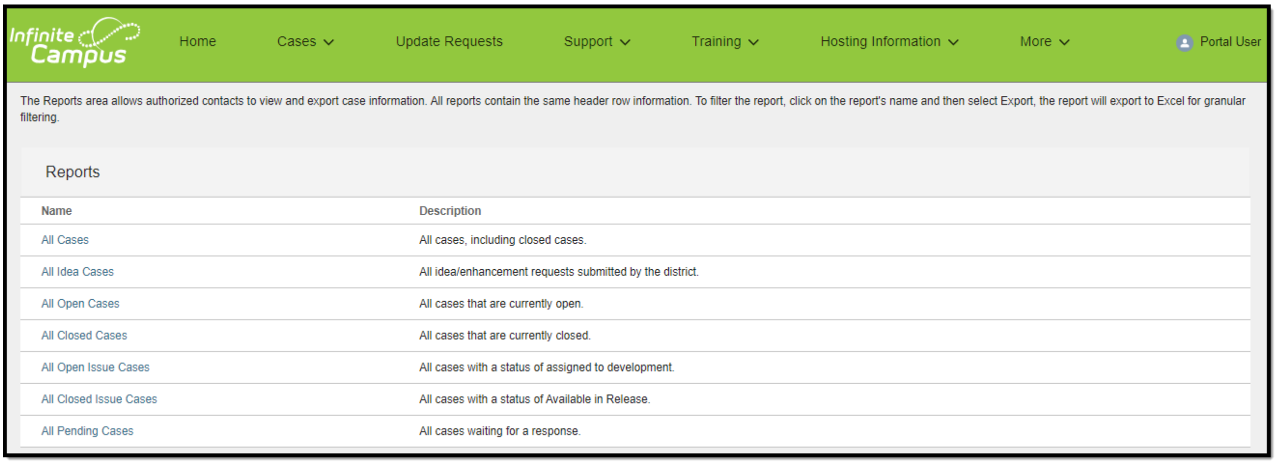
Report Layout | Filters | Exporting Reports

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



The following reports are available:

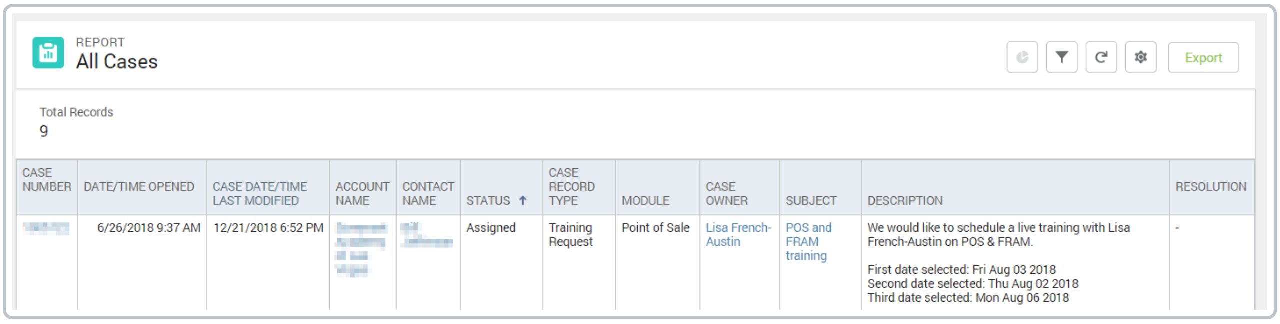
- **All Cases** - All district cases, including **Closed**
- **All Idea Cases**- All cases submitting enhancement requests
- **All Open Cases** - All district cases that are currently **Open**
- **All Closed Cases** - All district cases that are currently **Closed**
- **All Open Issue Cases** - All cases 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**



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.



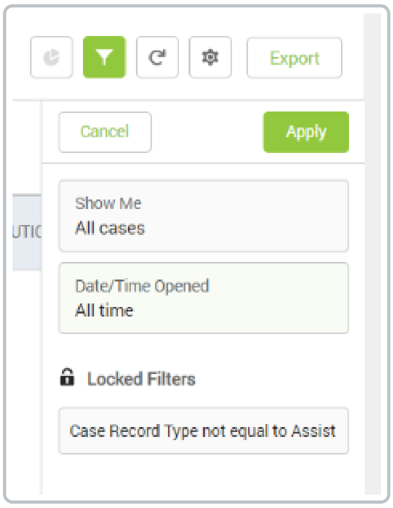
Filters

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.



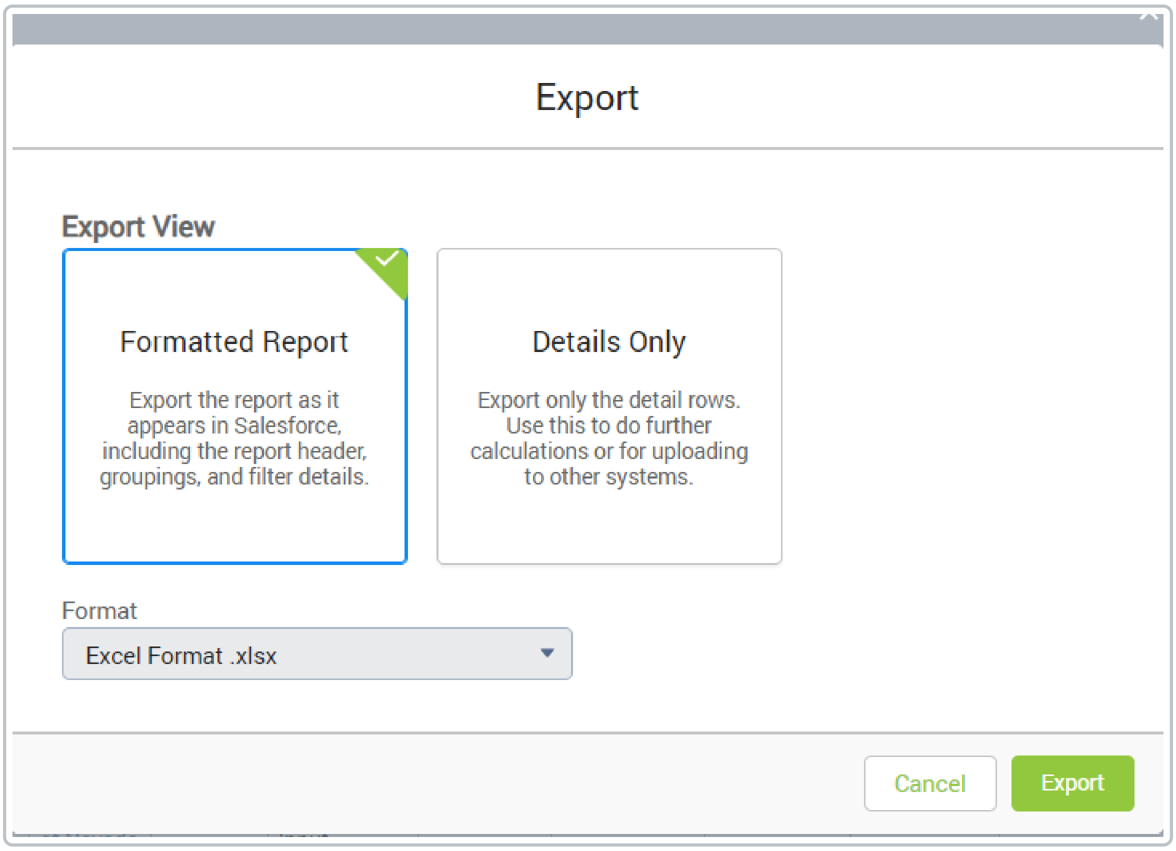
Exporting Reports

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
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