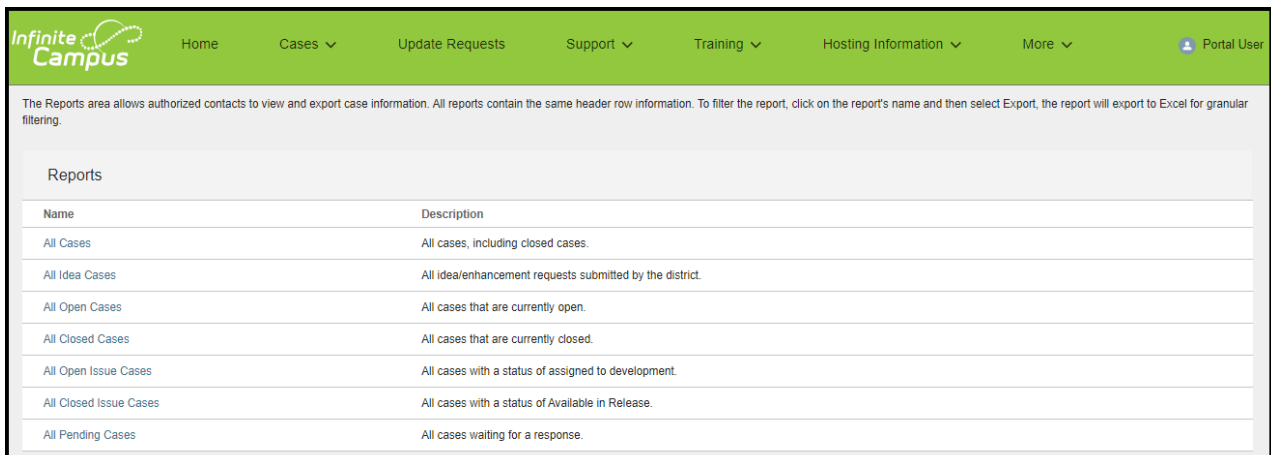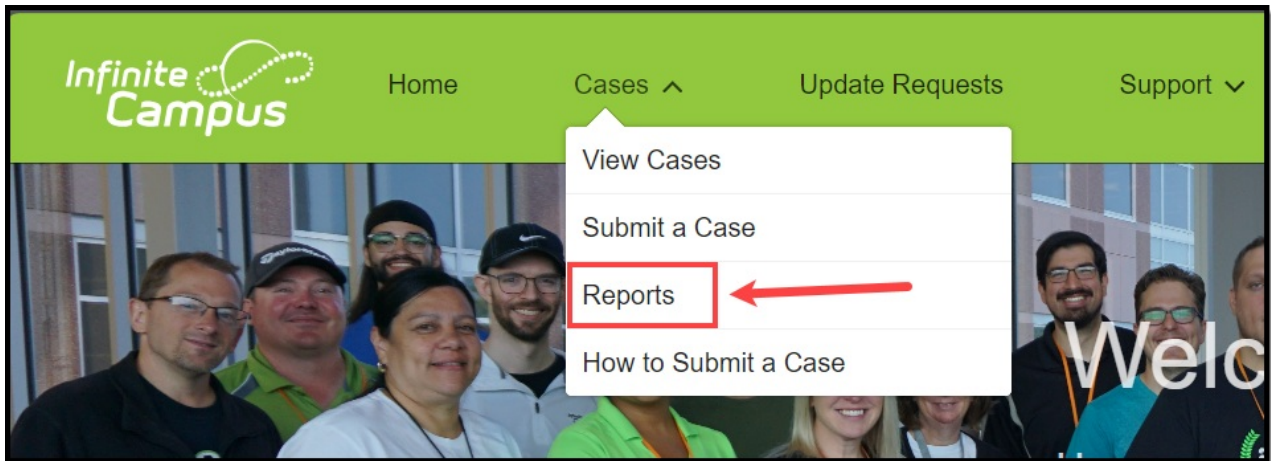# Reports

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

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. |



REPORT
**All Cases**

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.<br><br>First date selected: Fri Aug 03 2018<br>Second date selected: Thu Aug 02 2018<br>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.
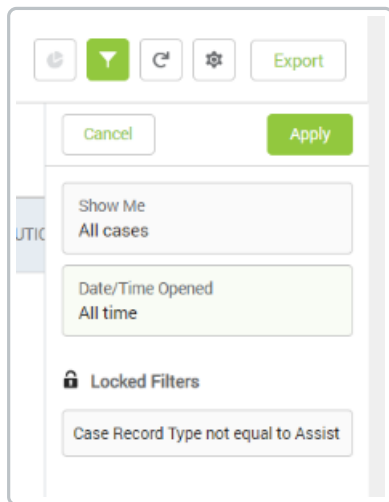


# Exporting Reports

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

**Export View**

| Formatted Report ✓ | Details Only |
|---|---|
| Export the report as it appears in Salesforce, including the report header, groupings, and filter details. | Export only the detail rows. Use this to do further calculations or for uploading to other systems. |

**Format**

Excel Format .xlsx ▾

Cancel     Export