Chapter 8 LSC Reports

The previous chapter explained the various methods available for viewing ticket information. This chapter discusses LSC's reporting module and presents instructions for generating reports based on the ticket information being maintained.

Introduction

What's in this Chapter

LSC is shipped with several pre-defined reports called "style sheets." The style sheets represent frequently requested reports which can also be customized to accommodate a specific need. By performing a "query," the information included in a report can be filtered according to virtually any combination of data values. For example, generating a report based on the All Tickets List by Date style sheet includes all tickets being maintained in the current LSC database. The information contained in the report can be filtered to include only the open tickets regarding printing problems specific to the Lotus spreadsheet. Queries can be saved and attached to any number of style sheets.

In addition to customizing the pre-defined style sheets, reports that are created using the Crystal Reports software can be added into the LSC system. These added reports can be customized, renamed and/or deleted.

NOTE:
The Crystal Reports software is installed using the LSC install procedure. A Crystal Reports program icon is added to the McAfee Program Manager group. Procedures for using Crystal Reports are presented in Part Two of this manual.

The following chart describes the sections in this chapter:

SECTION	DESCRIPTION
Using Pre-defined Report Style Sheets	Provides the procedures for generating pre-defined reports and selecting an output option.
Using Queries to Customize Reports	Provides the procedures for creating queries to filter report data, applying queries to reports and saving the report under a new name.
Adding New Reports	Provides the procedures for adding and managing new reports.
Sample Reports	Describes the contents of the pre-defined LSC reports and provides an illustration of each report type.

Using Pre-defined Report Style Sheets

The pre-defined style sheets supplied with LSC represent frequently requested reports. A pre-defined report can be generated "as is," or it can be customized by applying queries which further define the data to be included in the report.

This section lists the procedures for generating the reports listed in the Choose Reports dialog box. (The procedures for creating, applying and managing queries are discussed in the next section of this chapter.)

NOTES:

a - The pre-defined LSC report style sheets cannot be renamed or deleted.

b - If you have modified the LSC database labels, the report names listed in the Choose Report dialog box will reflect the current labels.

Printing Reports

Use the following procedure to generate the reports listed in the Choose Reports dialog box. (Refer to the other sections in this chapter for procedures on customizing the reports.)

1. **Choose the Reports tool bar button.**

   You can also choose the Choose Reports command from the Reports menu. The Choose Report dialog box displays, as in Figure 8-1.

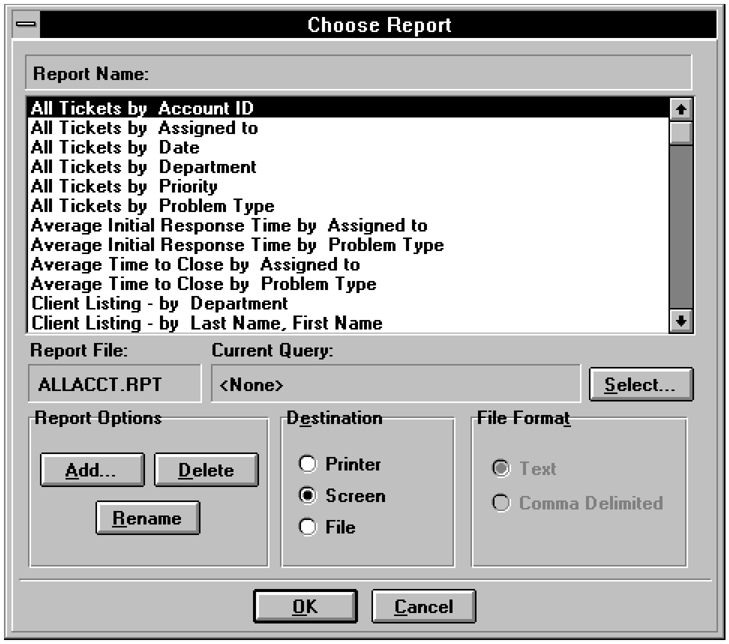

Figure 8-1: Choosing a Report to Print

2. **From the list of Report Names, select the report you want to generate.**

   Your selection is highlighted. The default selection is the first report name in the list.

3. **Select the report's destination.**

   The following destinations are available:

   ❑ **Printer** - Sends the report to the printer and uses the currently defined Printer Setup parameters. (Refer to "Printer Setup and Administration" in Chapter 5 for instructions on administering your print setup.)

   ❑ **Screen** - Sends the report to a window on your screen. Use the scroll bars to scroll through the report contents. If desired, choose the Print Report command from the File menu to send the report to the printer. Double click on the control menu button in the report window to close the window when you are finished.

   ❑ **File** - Sends the report to a file. When this option is selected, the File Format options become available. The format options are:

   - **Text** - output file is saved in ASCII format.
   - **Comma Delimited** - output file is saved in a comma delimited format in which commas are used to separate the fields.

4. Choose the OK button to initiate the creation of the report.

A Printing dialog box displays indicating the status of the report generation.

NOTES ON PRINTING:

a - If the report is sent to a file, you are prompted to enter a file name. Enter the file name and destination, and choose the OK button. The Printing dialog box displays even if the report is being sent to a file.

b - If the report is sent to the screen, the resulting report displays in a Crystal Reports dialog box. The buttons at the top of the dialog box from left to right can be chosen for page scroll to first page, previous page, next page, last page, stop scroll, page magnification and route report to printer. For detailed instructions on using the Crystal Reports software, refer to Part Two of this manual.

c - After a report has been sent to the screen, choose the Print Report command from the File menu to send the report to the printer. (The report window must be open or minimized for the command to work.)

d - If the report is sent to the printer, a "background report" is automatically printed after the selected report. The background report lists the queries that have been applied to the selected report.

e - Temporary files are created when reports are generated and routed to the screen or to a printer. As a result, if you have limited system resources (e.g., disk space or system memory), it is recommended that you apply a query to the report to narrow down the number of applicable records. Refer to the procedures on page 174 for instructions on applying a query to a report.

f - You must be captured to a queue when printing on a network.

Using Queries to Customize Reports

Queries can be defined and applied against a report to act as a filter for the data gathered from the LSC database. Queries can be saved and applied to any number of reports.

This section lists the procedures for:

- ❑ Applying a query to a report
- ❑ Customizing report style sheets
- ❑ Removing a query from a report
- ❑ Creating a new query
- ❑ Editing a query
- ❑ Deleting a query

Applying a Query to a Report

Use the procedure below to apply an existing query to a report.

1. **Choose the Report tool bar button.**

   The Choose Report dialog box displays, as in Figure 8-2.

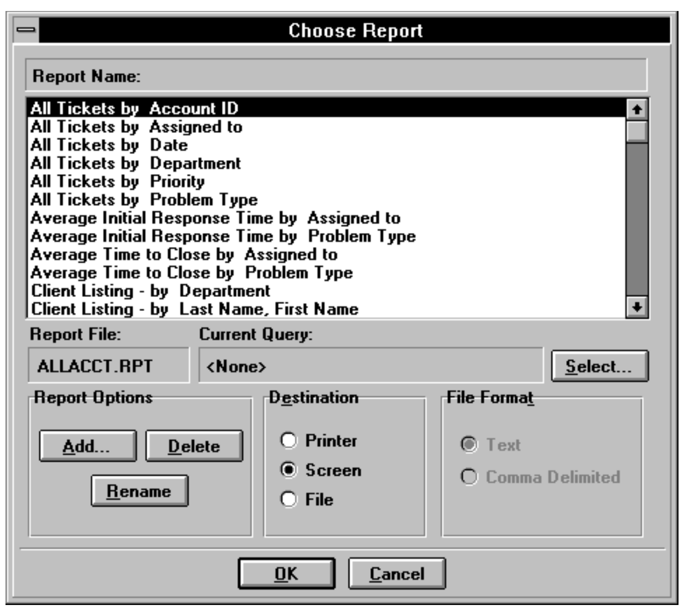

Figure 8-2: Choosing a Report to Print

2. From the list of Report Names, select the report to which you want to apply a query.

Your selection is highlighted, and the Current Query field displays the name of the query currently applied to the selected report.

NOTE:
The <None> entry in the Current Query field indicates that no query is currently applied to the report.

3. Choose the Select button to the right of the Current Query field.

The Select Query dialog box displays listing all queries, as in Figure 8-3. (Refer to page 177 for instructions on creating new queries if only the <None> entry appears in this list.)

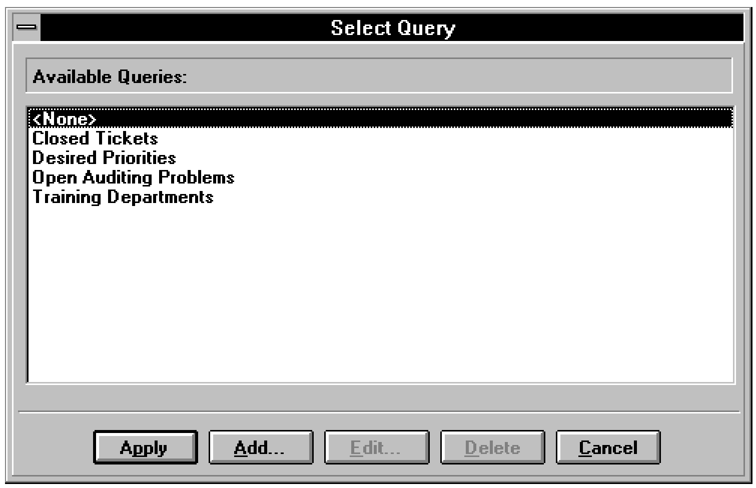

Figure 8-3: Selecting a Query to Apply to a Report

4. Select the query name from the Available Queries list, and choose the Apply button.

To select a query name, point to the query and click the left mouse button. Upon choosing the Apply button, the Select Query dialog box closes and the selected query name is placed into the Current Query field of the Choose Report dialog box. The LSC database records are sorted, and only the records that match the query's specified filter criteria will be included when the report is generated.

NOTE:
Before applying a query, make sure that the correct report name is highlighted in the Choose Report dialog box.

Customizing Report Style Sheets

A pre-defined LSC report can be customized by first assigning a unique name to the report and then applying a query which filters the data to be included in the new report.

NOTE:
For instructions on using the Crystal Reports software to create new inventory and distribution reports, refer to Part Two of this manual. For instructions on incorporating the new Crystal reports into LSC, refer to page 182.

Use the following procedure to customize a pre-defined style sheet.

1. **From the list of Report Names in the Choose Report dialog box, select the report on which you want to base the new report.**

   Select a report that consists of fields and data which are similar to the report to be created.

2. **Choose the Add button in the Choose Report dialog box.**

   The New Report dialog box displays, as in Figure 8-4.

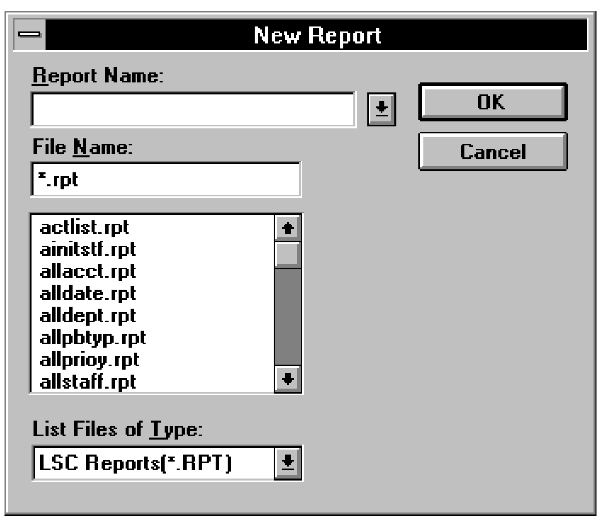

Figure 8-4: Naming a Customized Report

3. **Enter a new unique name in the Report Name field.**

The report name must be unique.

4. **Select a file name to be associated with the new report.**

   All report files in your LSC program directory are listed below the File Name field. Because the new report is to be based on the report selected in the Choose Report dialog box, click on the file name of the selected report. (The list of reports and their file names are provided on page 184.)

   For example, if you were customizing the Open Tickets by Date report, then you would select the OPNDATE.RPT file name.

5. **Choose the OK button to save the new report information.**

   The New Report dialog box closes. The new report name is added to the list of reports in the Choose Report dialog box.

   At this point, the new report contains the same information as the report on which it is based. Applying a query to the report will customize the data to be included in the new report. Refer to the procedure on page 174 entitled "Applying a Query to a Report."

Removing a Query from a Report

Use the following procedure to remove a query from a report.

1. **From the list of Report Names in the Choose Report dialog box, select the report for which you want to remove the query.**

   Your selection is highlighted, and the Current Query field displays the name of the query currently applied to the selected report.

2. **Choose the Select button to the right of the Current Query field.**

   The Select Query dialog box displays.

3. **Select the <None> query name, and choose the Apply button.**

   The Select Query dialog box closes. The filter criteria is removed and all records that apply to the report will be included when the report is generated.

Creating a New Query

Use the following procedure to create a new query. The procedure assumes that you have already chosen the Select button in the Choose Report dialog box to display the Select Query dialog box.

1. **Choose the Add button in the Select Query dialog box.**

   The Add Query dialog box displays, as in Figure 8-5. Press the <TAB> key to move from field to field within this dialog box.

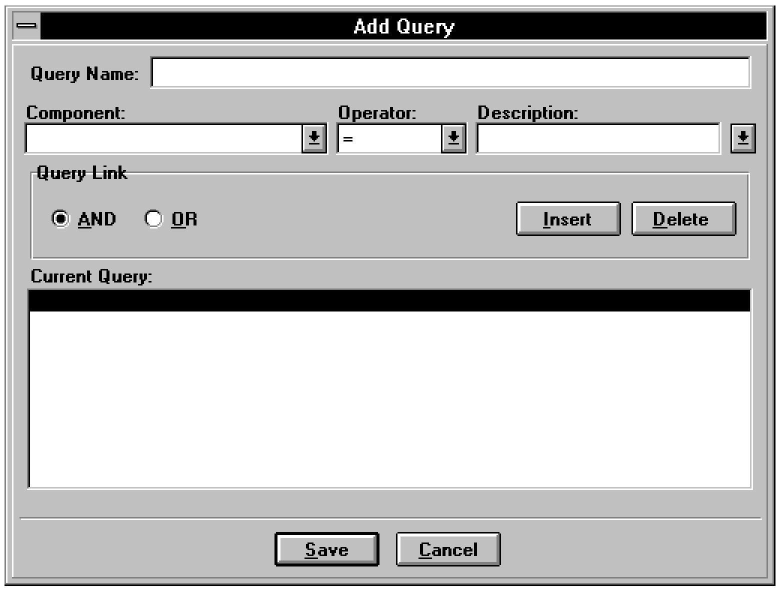

Figure 8-5: Defining a Query

2. **Enter a Query Name and define a filter entry.**

   The purpose of each filter entry is to narrow down the list of records to be included in a report. If more than one filter entry is defined, the entries are "linked" using either the AND or OR relationships.

   For example, assume the following two filter entries:

```
Assign To = DAN
Action Code = Callback
```

   If the entries are linked with the AND relationship, only the tickets that satisfy *both* criteria (i.e., all tickets assigned to Dan which have the callback action code) are included in the report definition.

   If the entries are linked with the OR relationship, the tickets that satisfy *either* criteria (i.e., all tickets assigned to Dan and all tickets with the callback action) are included in the report definition.

   For each filter entry, specify the following:

- ❑ **Query Name** - Enter a query name up to 80 characters in length.
- ❑ **Component** - Choose a component from the LSC database to use as the filter basis. Select a component from the drop-down list associated with this field (e.g., Action, Cross Reference, Ticket #).
- ❑ **Operator** - Choose an operator from the drop-down list associated with this field (e.g., = - equal to, < - less than, <> - not equal to).
- ❑ **Description** - If desired, choose a description of the component from the drop-down list associated with this field. The items which are included in this list depend on the selected component. For example, "Desired" and "Urgent" display as Descriptions if Priority is entered in the Component field; "True" and "False" display if Ticket Closed is entered in the Component field.
- ❑ **Query Link** - Specify the relationship between the filter entries (e.g., Assigned To = DAN OR Action = Callback). The link options are AND and OR.

NOTE:

All filter entries in a query must have the same Query Link type (e.g., all entries will be linked by AND or all entries will be linked by OR).

3. Choose the Insert button to accept the filter entry definition.

The entry is added to the Current Query list in the Edit Query dialog box. The Edit Query dialog box should look similar to Figure 8-6 below.

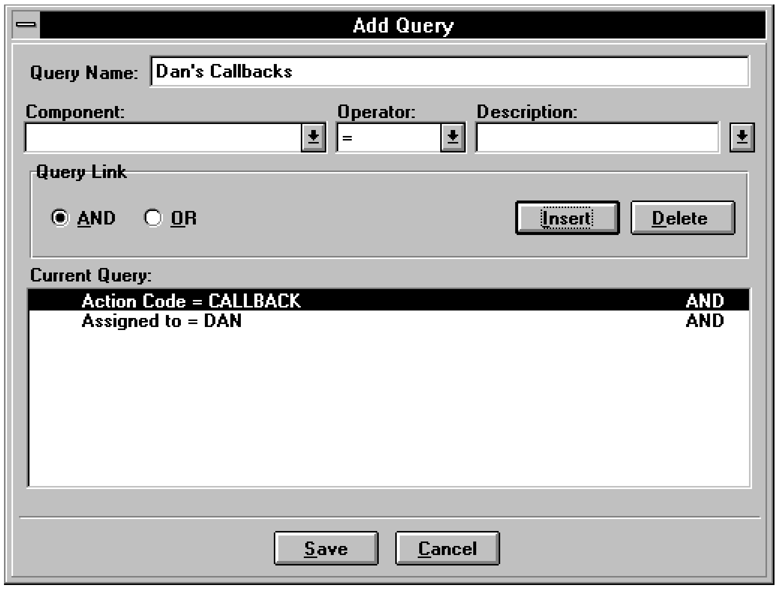

Figure 8-6: The Filter Criteria for a Query

4. **If required, insert additional filter entries.**

   Repeat steps #2 and #3 above.

NOTE:
To add a filter entry between existing entries, first highlight the filter entry line in the Current Query list where you want the new entry to be placed. The new defined entry is placed in the highlighted position.

5. **When all filter entries are defined, choose the Save button.**

   The query is saved and added to the Available Queries list in the Select Query dialog box. The new query can now be applied to a report.

Editing a Query

Use the following procedure to edit the definition of an existing query. The procedure assumes that you have already chosen the Select button in the Choose Report dialog box to display the Select Query dialog box.

1. **Select a query from the Select Query dialog box, and choose the Edit button.**

   The Edit Query dialog box displays showing the query's filter entries.

2. **Modify the information, and choose the Save button.**

   For instructions on modifying the filter entries, follow the procedure above entitled "Creating a New Query."

   To delete a filter entry, highlight the entry in the Current Query List and choose the Delete button.

NOTE:
To add a filter entry between existing entries, first highlight the filter entry line in the Current Query List where you want the new entry to be placed. The new defined entry is placed in the highlighted position.

Deleting a Query

Use the following procedure to delete an existing query. The procedure assumes that you have already chosen the Select button in the Choose Report dialog box to display the Select Query dialog box.

1. **Select the query to be deleted from the Select Query dialog box, and choose the Delete button.**

   A prompt displays asking you to verify the delete action. Choose the Yes button to delete the query. Choose No to cancel the delete action. The query is removed from the Available Queries list.

NOTE:
Queries that are currently applied to an LSC report can be deleted.

Adding New Reports

Additional reports can be incorporated into LSC through the use of the Crystal Reports software. Queries can also be applied to the new reports, and once added, the reports can be renamed and/or deleted.

NOTE:
The Crystal Reports software is installed using the LSC install procedure. A Crystal Reports program icon is added to the McAfee Program Manager group. Procedures for using Crystal Reports are presented in Part Two of this manual.

Adding Reports

New reports that have been created using the Crystal Reports software can be added into LSC by using the following procedure. All report files (.RPT) must be located in the LSC program directory.

Use the following procedure to add a new report into LSC.

1. **Choose the Reports tool bar button.**

   The Choose Report dialog box displays.

2. **Choose the Add button.**

   The New Report dialog box displays.

3. **Enter the Report Name of the report to be added.**

   The name entered in this field is the name that will display in the Choose Report dialog box.

4. **Select the File Name, and choose the OK button.**

   Select the .RPT file name to be added into LSC. (The .RPT files that display are located in the LSC program directory.) The selected file will be associated with the Report Name.

Renaming Added Reports

Use the following procedure to rename a Crystal report that has been added into LSC.

1. **Choose the Reports tool bar button.**

   The Choose Report dialog box displays.

2. **From the list of Report Names, select the report to be renamed and choose the Rename button.**

   The Rename Report dialog box displays prompting you to enter a new report name.

3. **Enter the new report name, and choose the OK button.**

   The new report name displays in the Choose Report dialog box, and the old name is removed. All attributes of the old report are preserved in the renamed report (i.e., the report contents and applied query do not change).

Deleting Reports

Use the following procedure to delete a Crystal report that has been added into LSC.

NOTE:
A pre-defined LSC report style sheet cannot be deleted; however, a report that was created using the Crystal Reports software and then added into LSC can be deleted.

1. **Choose the Reports tool bar button.**

   The Choose Report dialog box displays.

2. **From the list of Report Names, select the report to be deleted and choose the Delete button.**

   A prompt displays asking you to confirm the deletion.

3. **Choose the Yes button to delete the report.**

   Choose the No button to cancel the delete action.

   If deleted, the report name is removed from the Choose Report dialog box.

Sample Reports

There are several categories of pre-defined reports included with LSC. This section discusses the types of report categories and provides a sample window which illustrates the report contents.

NOTE:
If you have modified the LSC database labels, the report names and fields will reflect the current labels.

The report categories include:

- ❑ All Ticket Listings
- ❑ Averaging Reports
- ❑ Client Listings
- ❑ Closed Ticket Listings
- ❑ Open Ticket Listings
- ❑ Miscellaneous Reports

All Ticket Listings

The reports in this category include:

Report Name	File Name
All Tickets by Account ID	ALLACCT.RPT
All Tickets by Assigned To	ALLSTAFF.RPT
All Tickets by Date	ALLDATE.RPT
All Tickets by Department	ALLDEPT.RPT
All Tickets by Priority	ALLPRIOY.RPT
All Tickets by Problem Type	ALLPBTYP.RPT

Each report is primarily categorized by the label in its name (e.g., by account ID, by date or by priority). All tickets are then listed in ascending ticket number order.

Figure 8-7 illustrates the All Tickets by Priority report.

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All Tickets by Priority

Ticket #	Closed	Name	Phone	Assigned to	Problem Type	Product Category
URGENT						
DAN930930110516	Yes	MCGEE, FRED	333-555-5544	DAN	HARDWARE	MONITOR
LSC940222142933	No	MCGEE, FRED	333-555-5544	LSC	MODEM	1200 BAUD
LSC940222143519	No	MITCHELL, TINA	516-999-3434	LSC	PRINTER	CARTRIDGE
YEE930930110903	No	PIERCE, MATTHEW		YEE	MOUSE	DRIVER
YEE940112111341	No	PIERCE, MATTHEW		YEE	DRIVE	HARD DRIVE
Total: 5 ticket(s)						
IMPORTANT						
DAN931110110307	Yes	THOMPSON, MARY		DAN	CBT	COMPUTER TRAINING PACKA
Total: 1 ticket(s)						
DESIRED						
LSC940222134937	No	MCGEE, FRED	333-555-5544	LSC	PRINTER	CARTRIDGE
Total: 1 ticket(s)						

Grand Total: 7 ticket(s)

Figure 8-7: All Tickets by Priority Report

Averaging Reports

The reports in this category include:

Report Name	File Name
Average Initial Response Time by Assigned To	AINITSTF.RPT
Average Initial Response Time by Problem Type	AVEINIT.RPT
Average Time to Close by Assigned To	AVESTAFF.RPT
Average Time to Close by Problem Type	AVEPBTYP.RPT

Both Average Initial Response reports indicate the average time required for an initial action to be performed for a ticket.

The Average Time to Close reports indicate the average time required for the tickets to be closed.

Figure 8-8 illustrates the Average Initial Response Time by Problem Type report.

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Average Initial Response Time by Problem Type

Problem Type	# of Tickets	Total Time Elapsed Until Initial Response (DAY:HR:MIN)	Average Time for Initial Response (DAY:HR:MIN)
HARDWARE	3	104:00:00	34:16:00
MODEM	1	41:00:00	41:00:00
PRINTER	1	0:00:36	0:00:36
TOTALS:	**5**	**145:00:36**	**29:00:07**

Figure 8-8: Average Initial Response Time by Problem Type Report

Client Listings

The reports in this category include:

Report Name	File Name
Client Listing by Department	CLEDEPT.RPT
Client Listing by Name	CLENAME.RPT

Each report lists the detail information for the contact names assigned to an account. Figure 8-9 illustrates the Client Listing by Name report.

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Client Listing - Alphabetical by Last Name, First Name

Name	Department	Phone	Network Address
MCGEE, FRED	ACCOUNTING	333-555-5544	

Account ID : PAPER SUPPLY
Company ID : PAPER SUPPLY
Address Line 1 : 100 WHITE PAPER AVE
Address Line 2 : P.O. BOX 77
City, State, Zip : MINTON, IL 23001
Country : USA
Fax Number : 101-332-0389
Email :

Name	Department	Phone	Network Address
MITCHELL, TINA	SALES	516-999-3434	

Account ID : COMPUTER, ETC.
Company ID : COMP
Address Line 1 : 8654 3RD STREET
Address Line 2 : P.O. BOX 2001
City, State, Zip : LITTLETOWN, MO 45333
Country : USA
Fax Number :
Email :

Figure 8-9: Client Listing by Name Report

Closed Ticket Listings

The reports in this category include:

Report Name	File Name
Closed Tickets by Assigned To	CLSSTAFF.RPT
Closed Tickets by Date	CLSDATE.RPT
Closed Tickets by Department	CLSDEPT.RPT
Closed Tickets by Priority	CLSPRIOY.RPT
Closed Tickets by Problem Type	CLSPBTYP.RPT

Each report is primarily categorized by the label in its name (e.g., by date, by department or by priority). All closed tickets are then listed in ascending ticket number order. Figure 8-10 illustrates the Closed Tickets by Priority report.

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Closed Tickets by Priority

Ticket #	Name	Phone	Assigned to	Problem Type	Product Category
URGENT					
DAN930930110516	MCGEE, FRED	333-555-5544	DAN	HARDWARE	MONITOR
LSC940222142933	MCGEE, FRED	333-555-5544	LSC	MODEM	1200 BAUD
YEE930930110903	PIERCE, MATTHEW		YEE	MOUSE	DRIVER
YEE940112111341	PIERCE, MATTHEW		YEE	DRIVE	HARD DRIVE
YEE940112113013	PIERCE, MATTHEW		YEE	HARDWARE	MONITOR
YEE940112113031	PIERCE, MATTHEW		YEE	HARDWARE	MONITOR
YEE940112113046	THOMPSON, MARY	705-340-0002	YEE	CBT	COMPUTER TRAINING PACKAG
Total: 7 ticket(s)					
IMPORTANT					
DAN931110110307	THOMPSON, MARY		DAN	CBT	COMPUTER TRAINING PACKAG
Total: 1 ticket(s)					
DESIRED					
LSC940222134937	MCGEE, FRED	333-555-5544	DAN	PRINTER	CARTRIDGE
Total: 1 ticket(s)					

Grand Total: 9 ticket(s)

Figure 8-10: Closed Tickets by Priority Report

Open Ticket Listings

The reports in this category include:

Report Name	File Name
Open Tickets by Assigned To	OPNSTAFF.RPT
Open Tickets by Date	OPNDATE.RPT
Open Tickets by Department	OPNDEPT.RPT
Open Tickets by Priority	OPNNPRIOY.RPT
Open Tickets by Problem Type	OPNPBTYP.RPT

Each report is primarily categorized by the label in its name (e.g., by date, by department or by priority). All open tickets are then listed in ascending ticket number order. Figure 8-11 illustrates the Open Tickets by Assigned To report.

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Opened Tickets List by Assigned to

Ticket #	Name	Phone	Problem Type	Product Category
DP				
Priority = NECESSARY				
LSC940225150407	FOSGREEN, MAUREEN	(609)370-6630	PRINTER	POSTCRIPT
Total: 1 ticket(s)				
JU				
Priority = URGENT				
LSC940225145330	URGO, GEORGE	(908)373-0986	DAMAGED	HARDWARE
Total: 1 ticket(s)				
Grand Total: 2 ticket(s)				

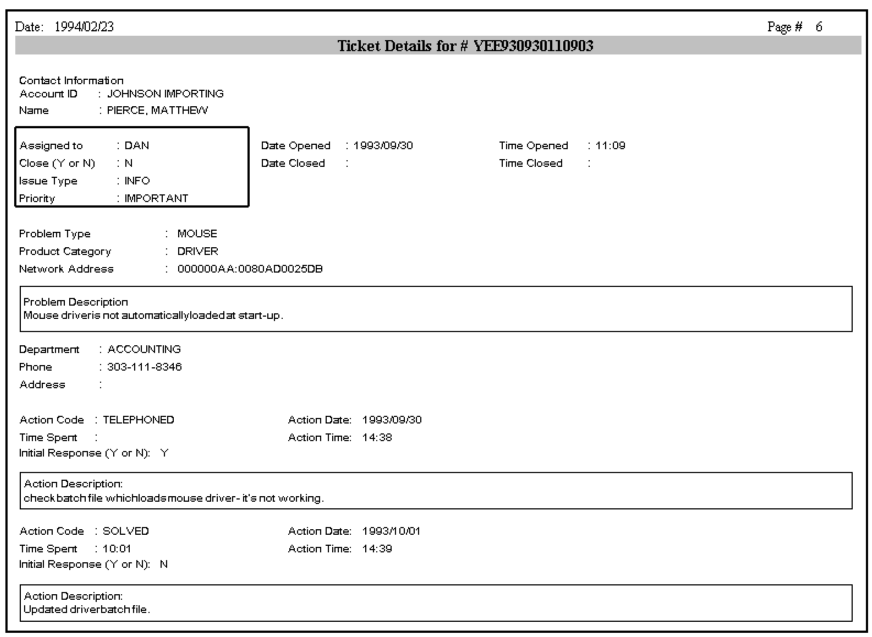
Figure 8-11: Open Tickets by Assigned To Report

Miscellaneous Reports

The reports in this category include:

Report Name	File Name	Description
Daily Action Listing by Person	ACTLIST.RPT	Categorized by LSC staff member and then by ticket action code.
Monthly Statistics by Problem Type	MONPBTYP.RPT	Categorized by problem type; lists statistics for the current month.
Monthly Ticket Load Statistics by Problem Type	MONTCKT.RPT	Categorized by problem type; lists the number of new, opened and closed tickets for the current month.
Ticket Details	TCKETDET.RPT	Lists the details for each ticket. Each ticket detail is listed on its own page. Use the buttons at the top of the report window to scroll through the list.

Figure 8-12 illustrates one page of the Ticket Details report.



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Ticket Details for # YEE930930110903

Contact Information
Account ID : JOHNSON IMPORTING
Name : PIERCE, MATTHEW

Assigned to : DAN
Close (Y or N) : N
Issue Type : INFO
Priority : IMPORTANT

Date Opened : 1993/09/30
Date Closed :

Time Opened : 11:09
Time Closed :

Problem Type : MOUSE
Product Category : DRIVER
Network Address : 000000AA:0080AD0025DB

Problem Description
Mouse driveris not automaticallyloadedat start-up.

Department : ACCOUNTING
Phone : 303-111-8346
Address :

Action Code : TELEPHONED
Time Spent :
Initial Response (Y or N): Y

Action Date: 1993/09/30
Action Time: 14:38

Action Description:
checkbatchfile whichloadsmouse driver- it's not working.

Action Code : SOLVED
Time Spent : 10:01
Initial Response (Y or N): N

Action Date: 1993/10/01
Action Time: 14:39

Action Description:
Updated driverbatchfile.

Figure 8-12: The Ticket Details Report