CHAPTER 11

REPORT MANAGER

Contents:

- Overview

- Add a New ExecReport

- Modify an ExecReport Name

- Delete an ExecReport

- Preview and Print an ExecReport

CHAPTER 11 – Report Manager

Overview

Two kinds of reports are available in SDS HelpDesk depending on your needs. Use SnapShot Reports when you want to see information for a currently selected record, or when you want a printout of items in a Lookup Table. SnapShot Reports can be previewed and printed directly from the module you are working in.

Use ExecReports when you need to print out details for groups of records. There are nine standard executive reports that are preloaded with SDS HelpDesk. You can change the name of any report to make it more meaningful to your organization. If you have Seagate Crystal Reports, Version 6.0, you can even add your own reports.

Click the Reports icon ![reports icon] in the toolbar to open the module.
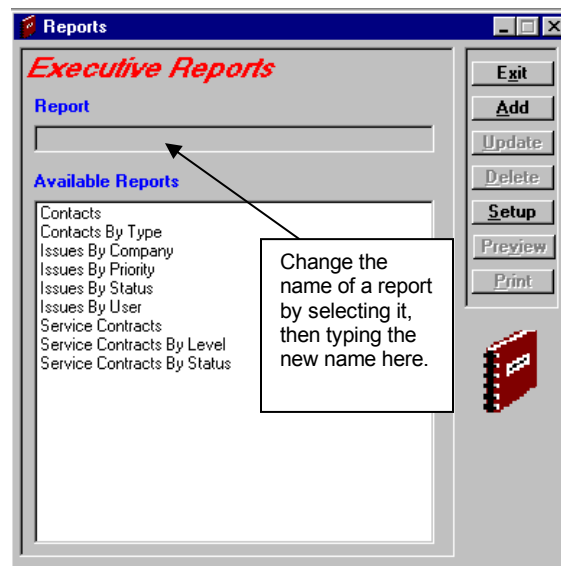
Reports Module

CHAPTER 11 – Report Manager
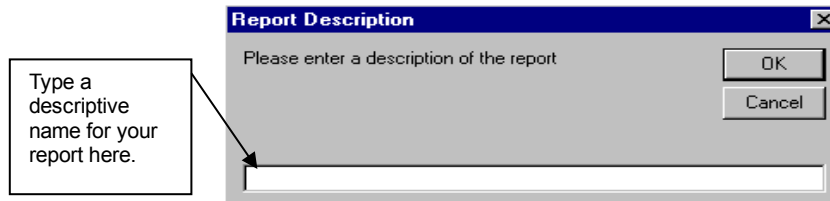
Steps to . . .

Add a New ExecReport

SDS HelpDesk SnapShot and ExecReports are located in the Reports folder. If you have Seagate Crystal Reports, Version 6.0, you can design and add your own executive reports.

NOTE: If you design your own reports, be sure to put them in the Reports folder under HelpDesk. The file name extension should be *.rpt.

Once your new report file has been put in the Reports folder, you can add it to the list of available executive reports.

1. Click the **Add** button. This launches the Open dialog box.

2. Use the Look In drop down list to locate the Reports folder. The default path is C:\Program Files\Scott Data Systems\HelpDesk\Reports. Double-click on the Reports folder to open it.

3. Select the new report you want to add to the Available Reports list. Click the **OK** button. The following dialog box opens.

Type a descriptive name for your report here.

Report Description

Please enter a description of the report

OK

Cancel

4. Type a descriptive name for your report in the edit box. Click the **OK** button.

NOTE: SnapShot reports should not be added to the Available Reports list.

Modify an ExecReport Name

1. Select the report from the Available Reports list.

2. Make your changes to the report name that is displayed in the Report edit box.

3. Click the **Update** button to save your changes.

Delete an ExecReport

1. Select the report from the Available Reports list.

2. Click the **Delete** button. This just deletes the report from the Available Reports list. It does not delete it from the Reports folder.

Preview and Print an ExecReport

1. Select the report from the Available Reports list.

2. Click the **Preview** button to see view the report on your screen. Click the **Printer** icon at the top of the Preview screen to get a hard copy of the report.

3. To print a report without previewing it first, click the **Print** button.

NOTE: Use the Setup button to select the print range and the number of copies you want.

CHAPTER 11 – Report Manager