issuetrak

report writer

The "Working with Report Writer" document introduced the basics of Issuetrak's Report Writer. This document outlines best practices and tips for working with queries and reports created with Report Writer. To understand the terms and features referenced here, please see "Working with Report Writer."

best practices
use filters to limit your data

Reports can use a lot of system resources when calculating, so make sure to match your needs with the appropriate data filters. For example, if you need to see just 150 issues submitted this week, make sure to use an expression that specifies "This Week" instead of "This Year" to avoid showing the larger number of issues created this year. Making detailed filter statements with more than one expression when building your query narrows down your results to just the required values.

Build Query: Step 2 of 3 - Create Filter

Cancel   < Back   Next >

Do you want to filter the data in the query?

* Field: [▾]

* Condition: [▾]

Save Filter Expression

Filter Expressions: edit |del   **A: Submitted On This Week**

Filter Statement: [A   ]   Reset

Examples:
A and B
A and (B or C)
A and B and NOT C
A and (B or C or D)
A and (B or (C and D))

duplicate data

Datasets such as Issues/Notes or Issues/Tasks use a combination of information that displays a line in the report for each note or task added to a particular issue in a one-to-many relationship. The query below shows how the information from the issue record is duplicated.

Use Grouping in the report to limit the duplication where possible. Below is a report grouped first by Issue Number, then by Submitter, and then by Issue Type. This leaves a cleaner report showing information from the unique Notes for the issue.

## include more fields than needed

Each query can be used to create multiple reports, so include fields in the query that may appear in different reports. For example, by including Issue Type and Priority in the query, you can create two reports, one grouped by Issue Type that doesn't show Priority, and the other grouped by Priority.

use query and report descriptions

The description for a Query or Report is displayed on the "Select Query" and "Select Report" pages in Report Writer. This information can include a statement of purpose with a list of the fields in the query or report. Having that information makes it easier to find the query or report you need, especially if you have a lot to choose from. This example shows the grouping, totals, and sort values as well as what fields are included.
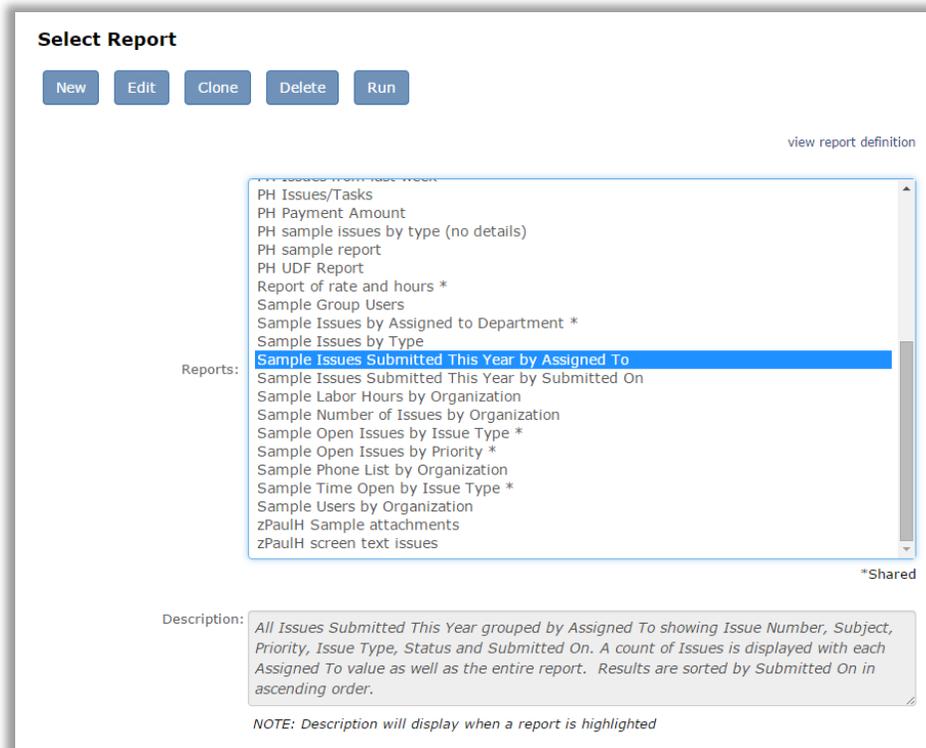
Select Report

New   Edit   Clone   Delete   Run

view report definition

Reports:

PH Issues/Tasks
PH Payment Amount
PH sample issues by type (no details)
PH sample report
PH UDF Report
Report of rate and hours *
Sample Group Users
Sample Issues by Assigned to Department *
Sample Issues by Type
Sample Issues Submitted This Year by Assigned To
Sample Issues Submitted This Year by Submitted On
Sample Labor Hours by Organization
Sample Number of Issues by Organization
Sample Open Issues by Issue Type *
Sample Open Issues by Priority *
Sample Phone List by Organization
Sample Time Open by Issue Type *
Sample Users by Organization
zPaulH Sample attachments
zPaulH screen text issues

*Shared

Description:
All Issues Submitted This Year grouped by Assigned To showing Issue Number, Subject, Priority, Issue Type, Status and Submitted On. A count of Issues is displayed with each Assigned To value as well as the entire report. Results are sorted by Submitted On in ascending order.

NOTE: Description will display when a report is highlighted

change default formats and settings

The Settings page under Reports allows you to set different formats for the field data types. To improve output on all reports, you may want to modify the defaults. For example, Decimal fields can be changed to display as currency fields with a dollar sign automatically added. Remember that this will change the value for each field using that data type.

Issuetrak also recommends the following modifications for the settings at the bottom of the page:

- Increase the maximum number of records returned by a Query or Report to allow more results. The default of 1000 may cause frustration if your users are trying to create a report that needs to return more than 1000 results.
- Increase the number of records printed per page to avoid blank spaces when printing your Report or Query.

- Increase the number of records displayed per page or set it to 0 for an unlimited value. This keeps you from having to click "Next Page" when viewing results within Issuetrak.

use formatting on specific reports

If you don't want to modify the default settings, formatting changes can be made on a specific report. On Step 5 of building a report, the formatting page allows you to make modifications for each field appearing in that report.

scheduled reports

Any report you create can be scheduled to be delivered via email. When adding a recipient to a scheduled report, there are two options when specifying recipients: User ID or email address. By selecting User ID, the report values are limited by a combination of user permissions, Organization, and Departmental membership. Using an email address sends an unfiltered report, showing the same values as would be seen by an administrator.

Add Recipient

Please select one of the following options:

User ID: [   ] 🔍

-OR-

Email Address: [   ]

NOTE: Adding an email address to the distribution list will cause the recipient to receive a scheduled report processed without any permission restrictions.
The receipient will receive the same report as an Administrator.

[Save] [Cancel]

tips and tricks

displaying date and time

In a report, by default, fields such as Submitted On only show the date.

Submitted By	Submitted On	Subject
Adam Moore	16 Jun 2014	Management of Change Test
Adam Moore	18 Aug 2014	Network Outage
Admin User	24 Jan 2014	Network Outage

To display both date and time when building a report, on the formatting step, remove the formatting value from the specific columns. By removing the formatting on the Submitted On field, the time value displays.

Submitted By	Submitted On	Subject
Adam Moore	6/16/2014 4:46:00 PM	Management of Change Test
Adam Moore	8/18/2014 3:18:00 PM	Network Outage
Admin User	1/24/2014 1:28:59 PM	Network Outage

creating summary reports

When building a report, you can create your own summary reports by using the "Suppress Report Details" on the formatting page.

This option limits the report to show only the headers and footers for each grouped section. Make sure to turn off the option to show headers when setting your group defaults and leave the footer option selected.

This results in a formatted report that shows the footer totals. This example shows the count of issues, the average number of days open, and the average labor time for each issue type.

Issue Type	Number of Issues	Average Adj Days Open	Average Labor Hrs
Applications Total:	7	187.45	00:00
Change Request Total:	9	205.61	00:34
Equipment Request Total:	3	177.19	00:00
Facilities Total:	15	223.77	01:15
Finance Total:	6	233.04	01:15
Harassment Total:	1	112.92	00:00
Hardware Total:	13	202.87	00:02
Human Resources Total:	12	221.49	09:39
Information Technology Total:	4	108.64	00:00
Network Outage Total:	9	107.09	00:00
Password Total:	2	271.50	00:00
Product Support Total:	6	271.25	02:00
Purchasing Total:	4	166.41	00:00
Screen text Total:	6	84.51	00:00
Service Complaint/Compliments Total:	14	174.47	00:13
Settlements Total:	3	218.96	00:00
Spec Funct Table Total:	10	82.78	00:00
User Access Total:	5	216.26	00:02
Report Total:	129	183.00	01:16

view in full screen mode

When viewing the results of a query or report, this option removes the Issuetrak menu and allows the data to fill the entire browser window for less scrolling. This can be useful when you need to see extra columns or rows.
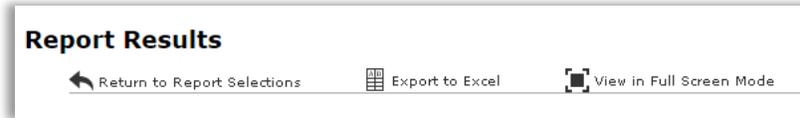
export to excel

You may elect to export your results to Excel. This allows for additional manipulation of data, such as creating graphs and charts based on your results. Check your export and make sure to save the report as an Excel file to ensure proper formatting before manipulating your data.

reporting on inactive types and subtypes

Issues Types and subtypes have the ability to be marked as inactive so that they can't be selected on issues. In order to report on these inactive objects, you must temporarily reactivate the Type or subtype long enough to create a filter in your query that includes those values. Once your query is created, you can deactivate the value. When you run the query or report, the deactivated value will be included.

renaming columns

By default, each column name in a report is the actual field name.

Renaming a column on a report can give the data more meaning.

Changing the column name on a report has no impact on the actual field name or column name on other reports or queries.

This is meant only to be a guideline of best practices when working with Issuetrak queries and reports. For a general guideline on writing queries and reports, please see the document "Issuetrak – Working with Report Writer". Please contact us at proservices@issuetrak.com if you have any questions.