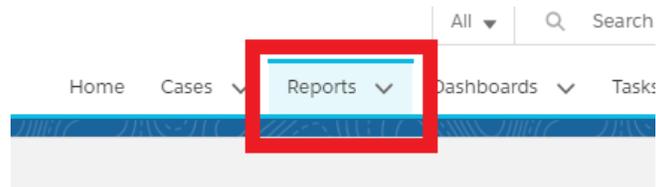


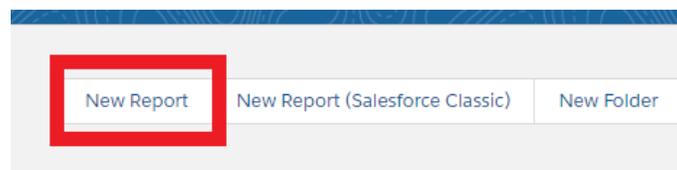
How to Create a New Report

Creating Custom Reports

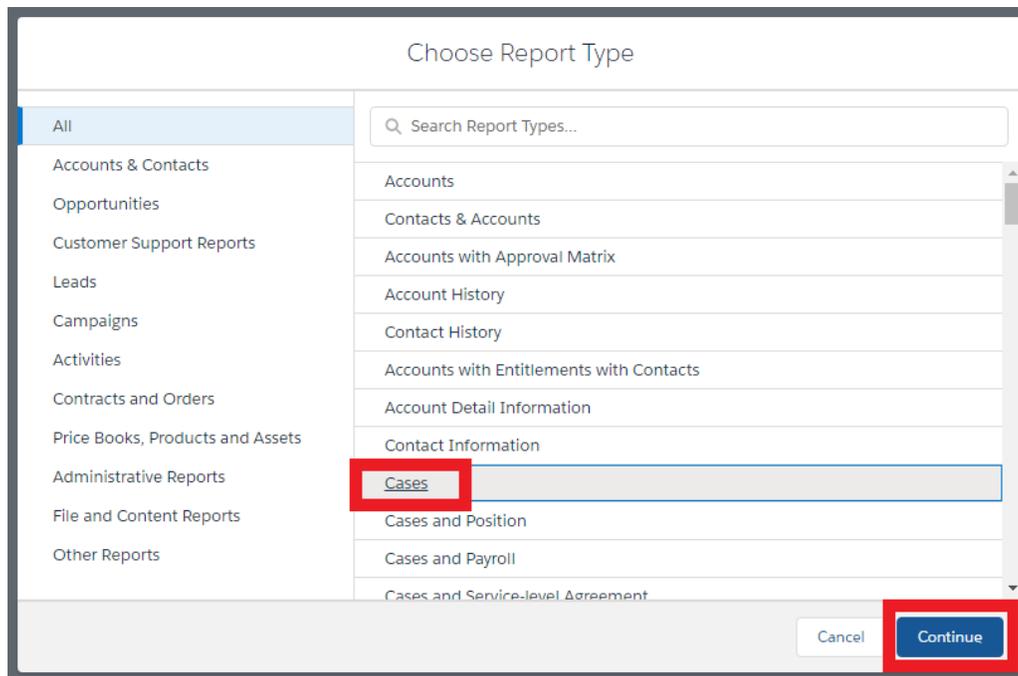
1. At the top of the screen, select "Reports".



2. Click "New Report" on the right side of your screen.

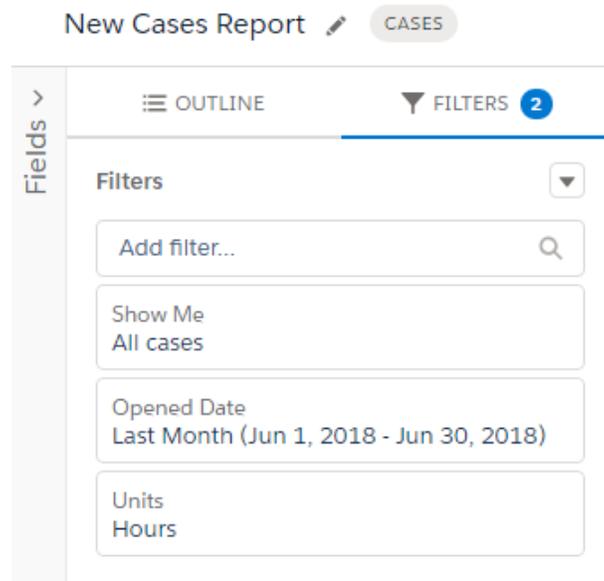


3. Once the next window opens, it will ask you to choose a report type. Select "Cases" among the list of Report Types and click "Continue".

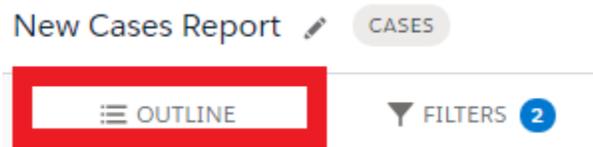


4. On the next screen, you will find the section with filters to add to your report; click the word FILTERS. The mandatory filter “Show Me” should always be “All Cases” if you are reporting on cases submitted. Use the “Opened Date” filter to adjust the action and time frame you are measuring. Ex; Date filter should primarily be Opened Date or Closed Date. Your Range can be any range or time you want. We’d suggest adjusting the “Units” filter to “days” and hit apply. You can also go up to “Add filter...” search box to add any additional filters. Our recommended additional filters are:

- I. Submitter Name (C)
- II. Case Status
- III. Case Record Type
- IV. Request Type



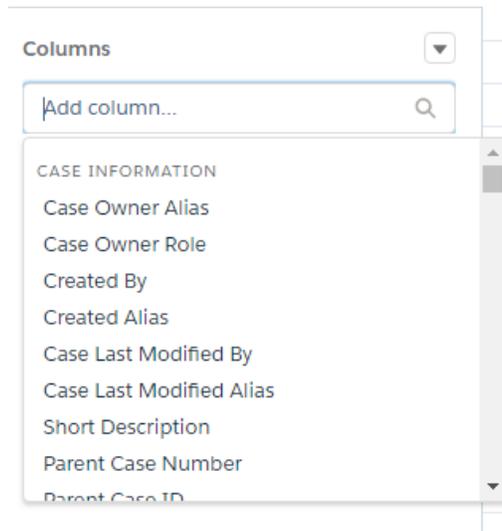
5. In addition, the same screen (as above) allows you to set up the columns you wish to view upon selecting the “Outline” tab.



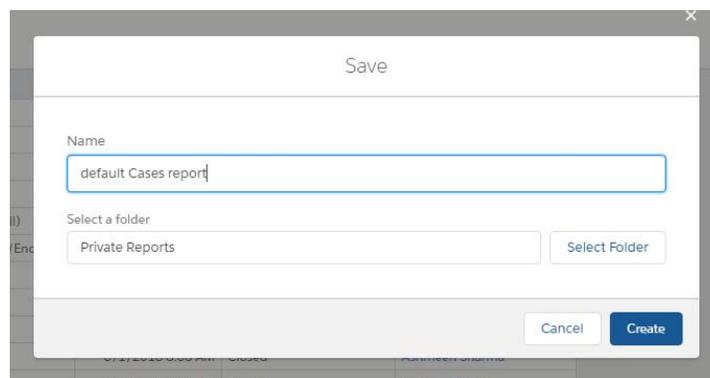
6. Once selected, you can choose the various columns you wish to view in your report by clicking in the “Add column...” cell. This will open a list of column names from which to choose, as shown below.

Recommended columns are:

- i. Case Number
- ii. Submitter Name (C)
- iii. Case Record Type
- iv. Date/Time Opened
- v. Case Status
- vi. Case Owner



7. You also have the ability to group the rows for the results in your report by clicking in the “Add group...” cell search bar
8. After selecting the columns to display on your report, click on the “Run” button found to the right of your screen.
9. Once the report runs and the desired results are obtained, click “Save”, also found on the right side of your screen. A new window will open and prompt you to provide a name for your report, such as:



10. Once you enter the report name, click “Create” and your report will be saved. The default folder for saving will be your “Private Reports”, which will be accessible only by you.

Contact Us

If you have any additional questions, please call us at the Service Desk (530) 754-4772 or email aggieservice@ucdavis.edu and we will be happy to assist you.