CUSTOMIZING AND SUBSCRIBING TO REPORTS QUICK GUIDE

CUSTOMIZING REPORTS

Description: This quick guide provides the steps for customizing report templates. Information included:

- Report Templates
- Customize a report from template
- Step 1: Customize a report
- Step 2: Add case owners and queues
- Additional knowledge resources (see knowledge for how to subscribe to a report)

Related resources on MyFSU Service Center page

- Customize a Report recording

NEW REPORT TEMPLATES

Service Offering Report: Review cases based on Service/Service Offering data

Cases 7 days w/out Update: Template report that uses the "Last Modified By" field to help identify stale cases that may need updates

Team/Agent Workload Report. Template report used to view open cases owned by your groups/agents. Use OR filter logic for each Queue/Role/Agent reporting is needed for

Templates can be found in th**e myFSU Service Center Templates** folder

CUSTOMIZE A REPORT FROM TEMPLATE

Follows these steps to create your areas report for **Cases 7 days w/out Update**

- Create a clone from a report template
- Add Team Members/Case Owners or Queues

- View the myFSU Service Center - Glossary of Fields for Lists and Reports.for details on fields and columns.

STEP 1: CUSTOMIZE A REPORT

1. Click on **Reports** at top of dashboard in navigation bar
2. Click on **Shared with Me** on the left
3. Click on **myFSU Service Center Templates**
4. Select from available report templates (Ex. **Cases 7 days w/out update**)
5. Click on the name of report to copy
6. Click on drop down arrow next to **Edit** at top right of page
7. Click **Save As** from drop-down
8. Enter following fields, **Report Name, Report Unique Name** (not required and report name will default) and **Report Description**
9. Click **Select Folder**
10. Click **All Folders**
11. To save the report so that anyone can access it, select **Public Reports** folder. To save the report in a private folder, select **Private Reports** folder.
12. Click **Select Folder**
13. Click **Save.** You have now created a duplicate, continue to next steps

STEP 2: ADD CASE OWNERS & QUEUES

1. Click **Edit** at top right of page
2. Click on **Filters** from filter section at left side of the page
3. In the filter field, search for filters from available **Case Information**
4. Click on **Case Owner** to add either the following filter(s) to the existing report filters
5. Enter the names of your team members or your queue(s) separated by commas in the field below **equals**
6. Click **Apply**

7/ Click **Save and Run** at the top of your screen.

NOTES - Add a checkmark in the Locked field to lock filters from being removed. To maintain private ownership for Public Reports (to share with team members or others), locking fields is recommended.

Your cases will appear on the right-hand side of your screen, grouped by Last Queue and Case Owner.

KNOWLEDGE RESOURCES

- For more detailed information, see the Knowledge articles linked below.
  For more articles, go to Knowledge and select the "Agent Training Articles" list. You can also search for the #AgentTraining topic and go to the Related section of that topic page.
- Knowledge articles in the myFSU Service Center may be archived or removed over time. If you are unable to locate an article by the link included in this training document, please be sure to search for the article by name instead

How to Customize a Report Template

How to Subscribe to a Report