



## Running Predefined Reports in *HelpSU*

### Enable ODBC

1. Prior to running any predefined reports, enable ODBC (Open DataBase Connectivity). Select Tools>Options.
2. Click on the Advanced tab.
3. Click once on the box next to "ODBC Use Underscores." (This will confirm that the ODBC driver translates special characters such as colons, spaces, etc., into underscores.)
4. Press OK.

### Run Predefined Reports

1. Click on Reports link on the Remedy Support Console.
2. On the Report Console, click the drop down arrow next to the Report Name\* field.
3. Select Help Desk (Asset Information and Change Information menus not used).
4. Select the category of either Case Information or Solutions (Satisfaction Ratings menu not used).
5. Select the predefined report you wish to run. After selecting the report, the report name/format is confirmed and you must select qualifications.
6. In Field 1, click the drop down arrow to select the field name for your qualification.
  - Example: The Cases by Group report must have the Assigned to Group+ identified, or it will try to run the report on all groups in HelpSU.
7. On the Field 1 window, select the field name and press OK.
8. In the Operand field, click the drop down arrow to select the operator to link the first qualification to an identifier.
  - Example: If Field 1 is the Group name, the Operand will probably be = (equal to).
9. In the Value field, enter the qualifier exactly as it appears in HelpSU.
  - Example: If Field 1 is the Group name, enter the exact Group name, such as *ITSS HelpSU Support*.
10. In the lower left of the Report Console window, select the report destination. You may wish to preview the report before printing; if so, select a Screen destination (Screen is the default).
11. Press the Run Report button. The report opens in a separate window.
12. Press the Printer icon button on the Report window to print.
13. Press the Export button to save the report; specify the file type and destination.
14. To save this qualification for future use, from the Report Console, press the Save Qualification button.

15. On the Qualification Name window, give this qualification a unique name.
16. Press OK.
17. A confirmation of your saved qualification will appear.

### **Use a Saved Qualification on a Predefined Report**

1. From the Report Console, select the report name you wish to run.
2. Press the Select Saved Qualification button.
3. The search criteria from the selected qualification are displayed.
4. Select the report destination and press the Return Selected button.
5. Press the Run Report button and the report opens in a separate window.