California State University
Northridge

Information Technology

EBSUITE – CREATING REPORTS REFERENCE GUIDE

TOP 3 REPORTS FOR MANAGERS

EbSuite has the ability to create a variety of reports. There are 3 reports recommended for managers and directors that will help you to monitor the work being performed by your staff/area.

1. Aging Report
2. Workflow Report
3. Call Type Report

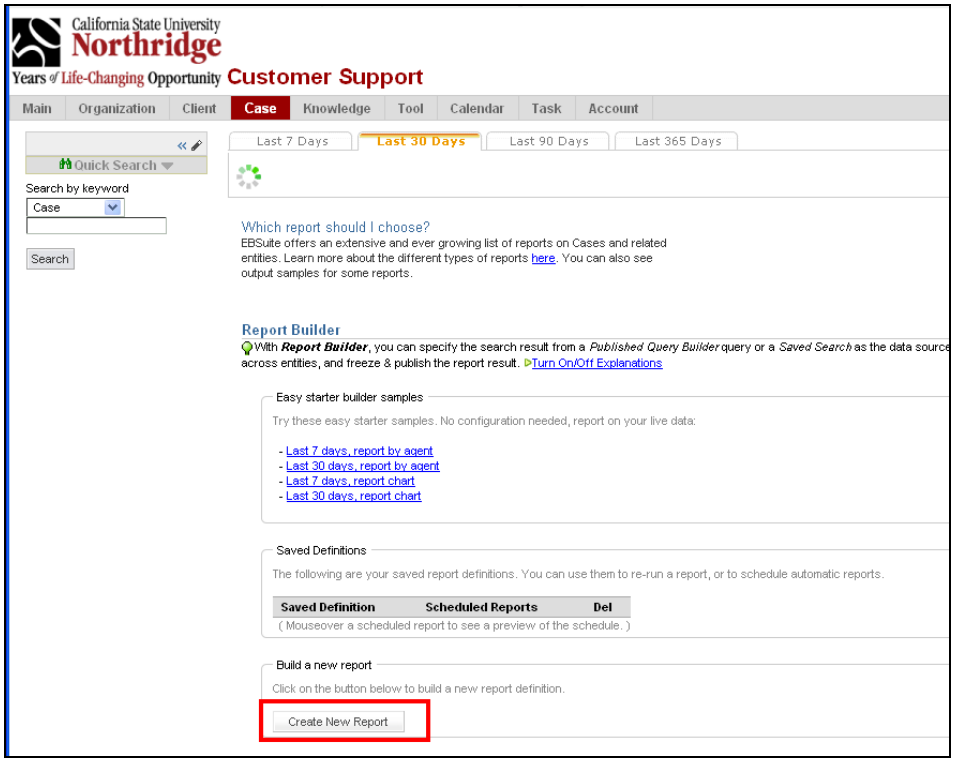
This document will give you the step by step to create each of these reports.

#1 - AGING REPORT

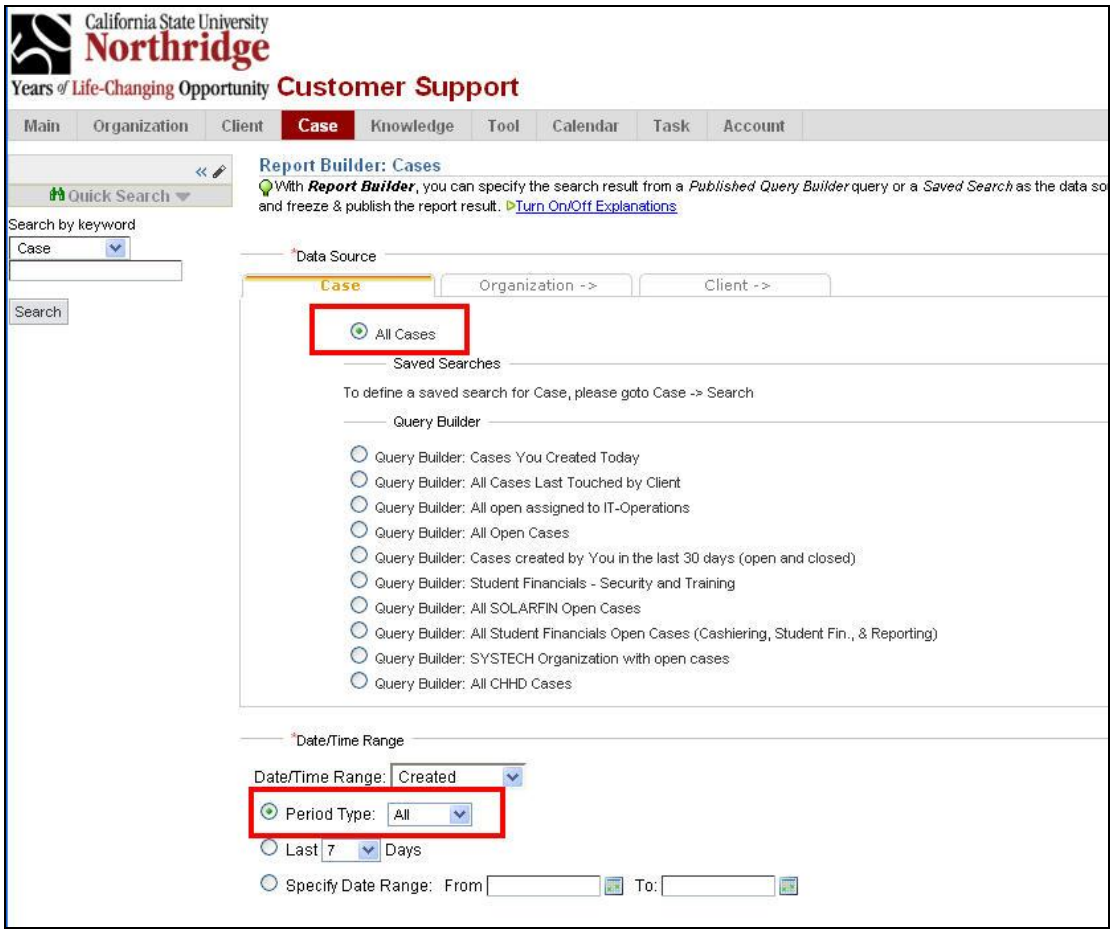
The aging report will tell you how many cases are open, who they are assigned to and how old they are.

1. Once logged in to the EbSuite application, select the **Case tab** and **Reports** from the sub menu.

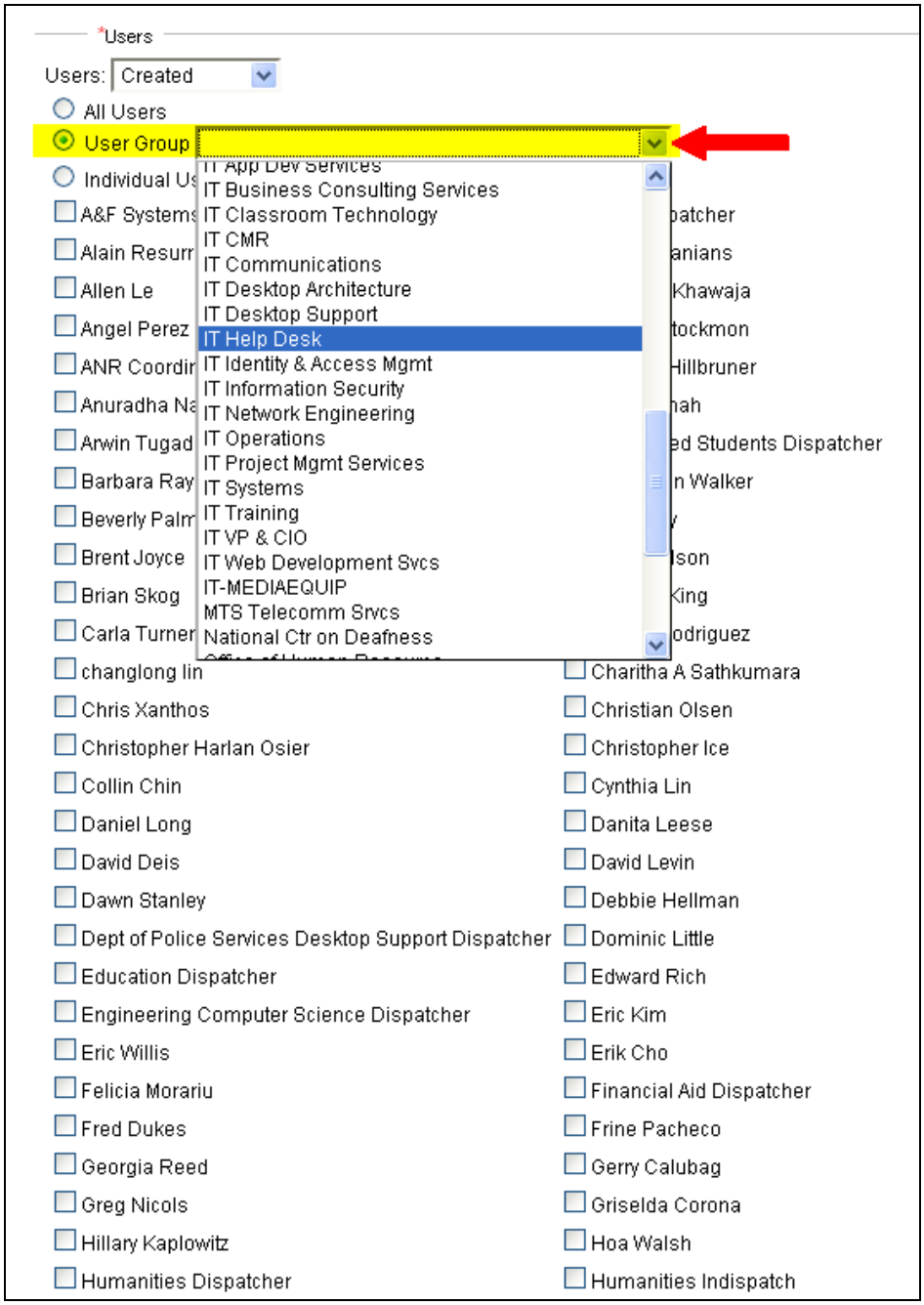
2. The Reports view appears.
3. In the Report Builder section, select the **Create New Report** button.



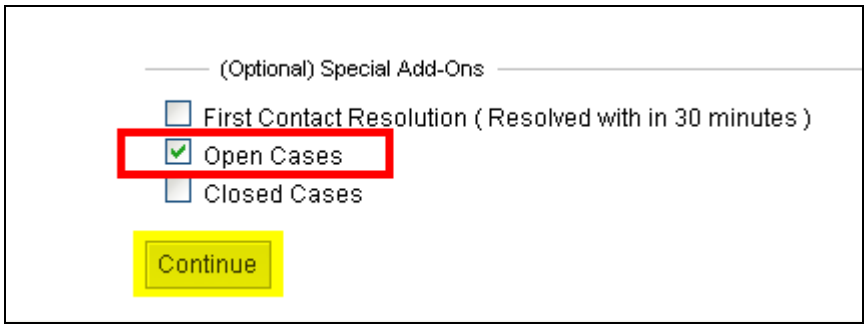
The Report Builder: Cases view appears.



4. In the **Data Source category** from the Case tab (that displays by default), select the **All Cases** option. See figure above
5. In the **Date/Time Range category** select the **Period Type** option and use the drop down field to select the **All** option.
6. In the **Users** category select the **User Group** option and use the drop down field to select the appropriate group OR you can also select the individual users option and check each of the appropriate boxes in that section. See figure below

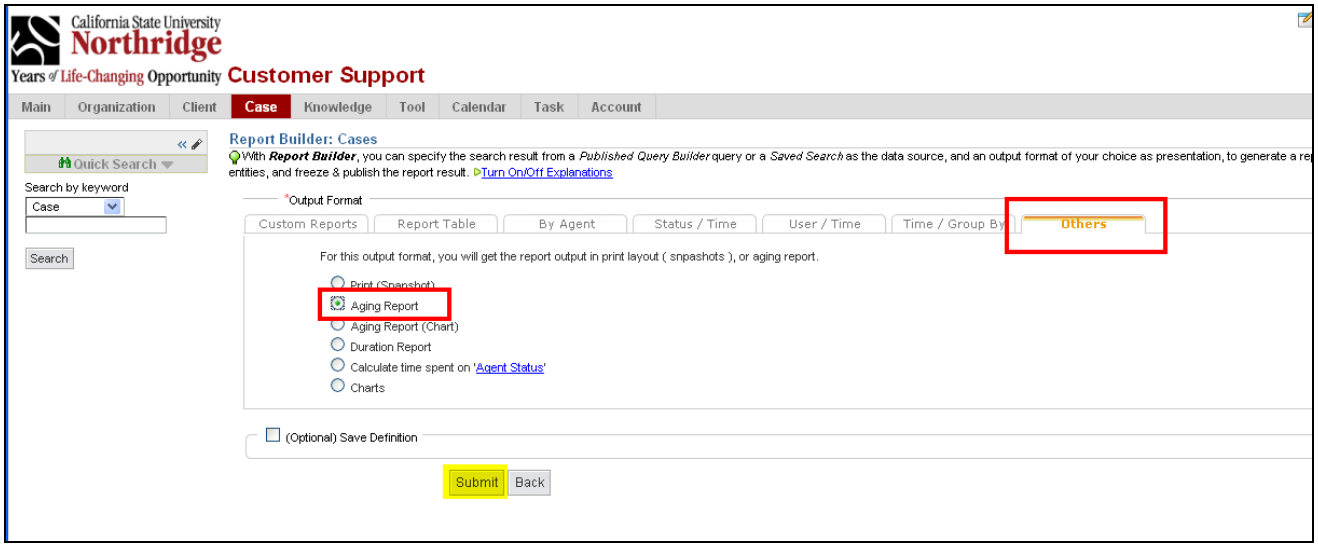


7. In the **(Optional) Special Add-Ons category** select the **Open Cases** option. See figure below.
8. Select the **Continue** button.



The Report Builder: Cases Output Format view appears

9. In the **Output Format** section, select the **Others tab**.



10. Select the **Aging Report** option.
11. Select the **Submit** button.

The requested report and data will appear.

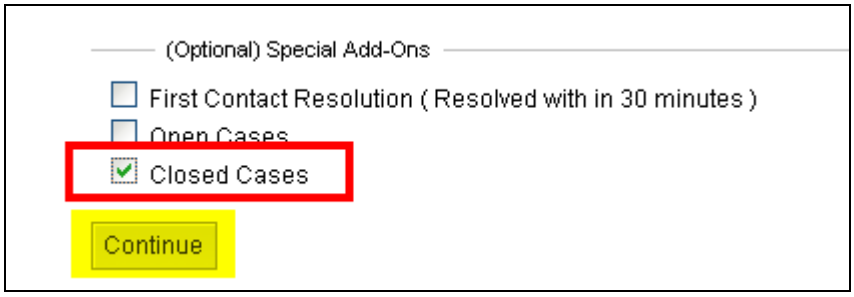
2 - WORKFLOW REPORT

The workflow report will tell you how many cases the technicians close per week during a specified timeframe.

1– 6. Follow steps 1 – 6 in the Aging Reports section above.

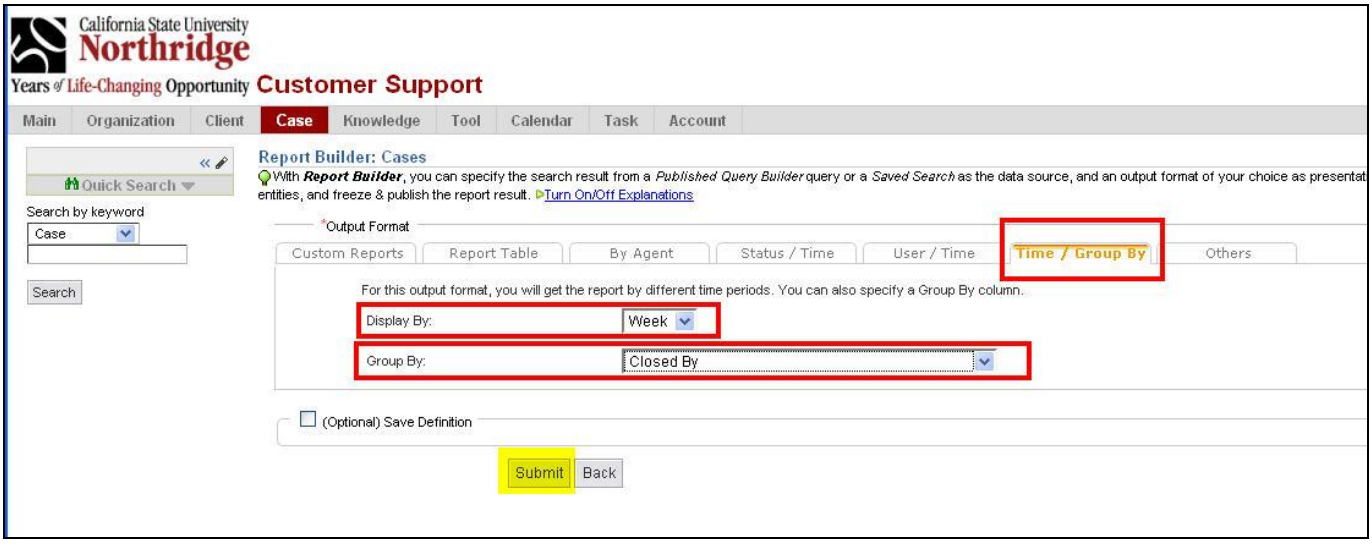
7. In the **(Optional) Special Add-Ons category** select the **Closed Cases** option. See figure below.

8. Select the **Continue** button.



The Report Builder: Cases Output Format view appears

9. In the **Output Format** section, select the **Time/Group By tab**.



10. In the **Display By** field use the drop down option and select **Week.**

11. In the **Group By** field use the drop down option and select **Closed By.**

12. Select the **Submit** button.

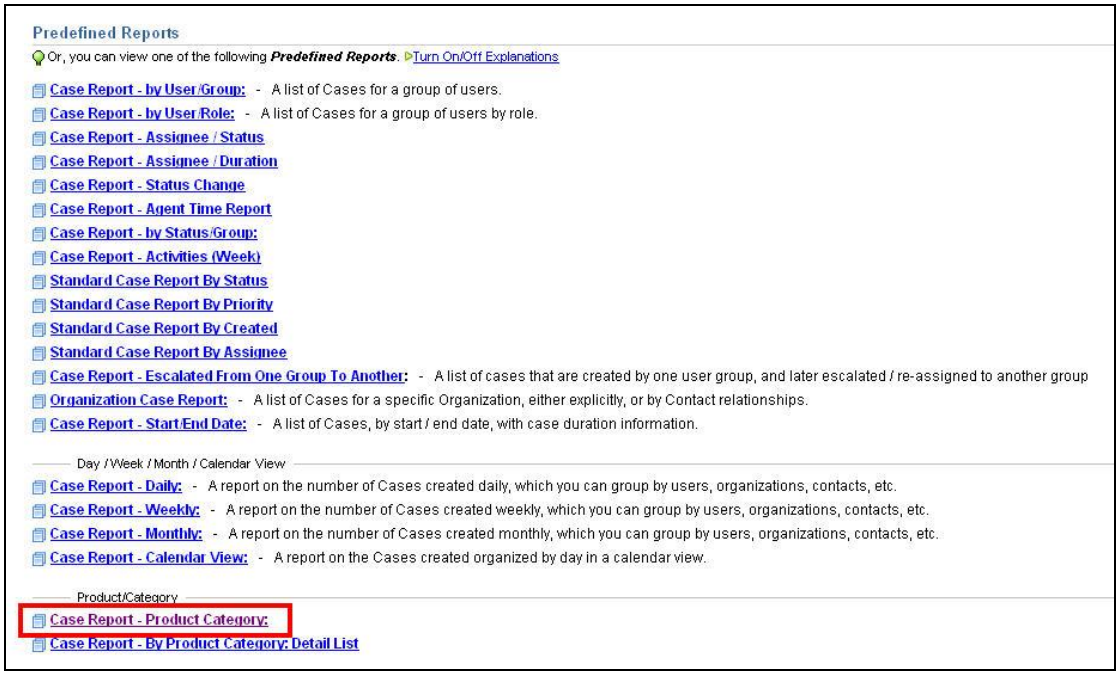
The requested report and data will appear.

3 - CALL TYPE REPORT

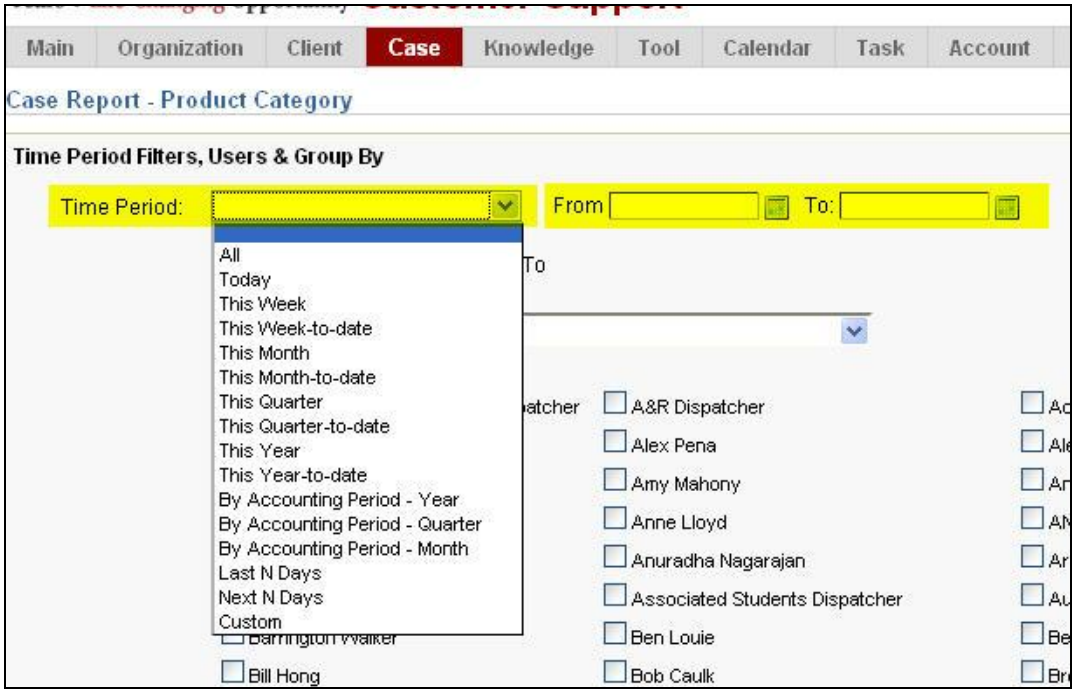
The call type report will display the types of calls being assigned to a technician.

1– 6. Follow steps 1 – 6 in the Aging Reports section above.
7. The Reports view appears.

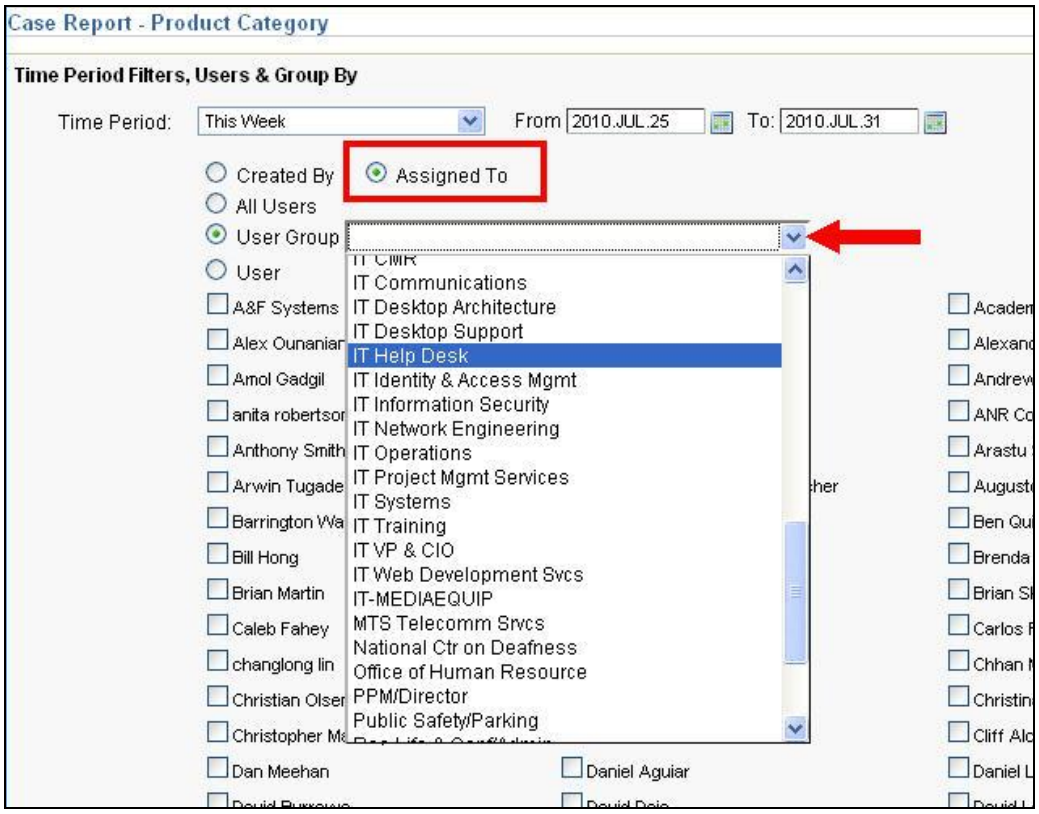
8. In the Predefined Reports section and the Product/Category subsection, select **Case Report – Product Category** option



The Case Report – Product Category view appears.



9. Complete the **Time Period** fields.
10. Select the **Assigned To** option.
11. Select the **User Group**. Use the drop down field to select the appropriate group OR you can also select the individual users' option and check each of the appropriate boxes in that section. See figure below



12. Select the **Submit** button.

The requested report and data will appear.

NEED HELP?

Contact IT Training by phone (818-677-1700), or online at (http://techsupport.csun.edu).