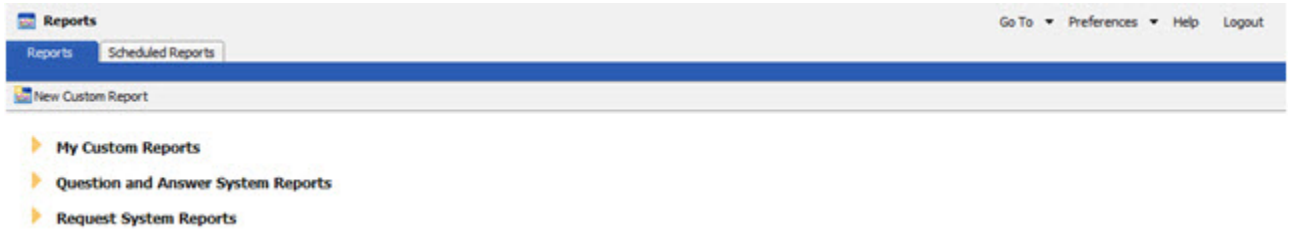



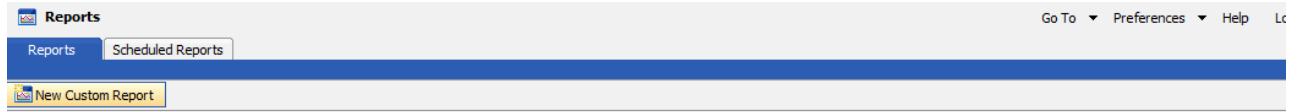
Reports

The GovQA Administration Tool provides a powerful interface for viewing information about your GovQA site. Clicking the “Reports” menu accesses this Reports module. You can get there by clicking on Go To > Reports



Question and Answer System Reports

To generate a report, select the  next to the corresponding report you would like to generate. Then, you will choose your selection criteria. For each system report the selection criteria will be different. Please see the list below to view the information on each Question and Answer System Report.



The screenshot shows a web interface with a 'Reports' header and a 'Scheduled Reports' tab. Below the header is a 'New Custom Report' button. The main content area is titled 'Shared Reports' and contains a sub-section for 'Question and Answer System Reports' which lists various reports with their descriptions and owners.

	Report Name	Description	Owner
	Message Center Opt Ins	Message Center Opt Ins	System
	Question Activity by Filter	Lists all questions created by filter during a selected date range	System
	Question Activity by Filter - Daily Count	Lists all questions created by filter during a selected date range -- daily count	System
	Question Activity by Filter and Status - Daily count	Lists all questions by filter and status during a selected date range - daily count	System
	Question Activity by Staff and Status - Daily Count	Lists all questions by staff and status during a selected date range - daily count	System
	Rating Information	Listing of how answers were rated by users, including feedback	System
	Staff Performance	Lists all questions by staff and status during a selected date range	System
	Staff Workload By Group - Daily Count	Lists total daily emails received and responded to during a selected date range	System
	Staff Workload By Group and Staff	Lists total emails received and responded to during a selected date range	System
	Staff Workload By Staff - Daily Count	Lists total daily emails received and responded to during a selected date range	System
	Staff Workload By Staff and Department	Lists total emails received and responded to during a selected date range	System
	Top Answers Viewed	Lists all answers viewed during the selected date range	System
	Top Answers Viewed by Filter	Lists all answers viewed by filter during the selected date range	System
	Top Phrases By Filter	Lists popular search phrases entered by filter during a selected date range	System

[Click here to access legacy reports](#)

Report	Description	Parameters
Message Center Opt Ins	Message Center Opt Ins	Create Date & Output Style
Question Activity by Filter	Lists all questions created by filter during a selected date range.	Create Date, Group, & Output Style
Question Activity by Filter – Daily Count	Lists all questions create by filter during a selected date range. –daily count	Create Date, Filter A, Group, & Output Style
Question Activity by Filter and Status – Daily Count	List all questions by filter and status during a selected date range. –daily count	Create Date, Assigned Staff, Filter A, and Output Style
Question Activity by Staff and Status – Daily Count	Lists all questions by staff and status during a selected date range. –daily count	Create Date, Assigned Staff, Filter A, & Output Style
Rating Information	Listing of how answers were rated by	Create Date, Group,

	users, including feedback.	and Output Style
Staff Performance	Lists all questions by staff and status during a selected date range.	Create Date, Assigned Staff, and Output Style
Staff Workload by Group – Daily Count	Lists total daily emails received and responded to during a selected date range. –daily count	Action Date, Group, & Output Style
Staff Workload by Group and Staff	Lists total daily emails received and responded to during a selected date range.	Create Date, Group, & Output Style
Staff Workload by Staff – Daily Count	Lists total daily emails received and responded to during a selected date range. –daily count	Create Date, Assigned Staff, & Output Style
Staff Workload by Staff and Department	Lists total emails received and responded to during a selected date range.	Create Date, Assigned Dept, Assigned Staff, & Output Style
Top Answers Viewed	Lists all answers viewed during the selected date range.	Action Date, Group, & Output Style
Top Answers Viewed by Filter	Lists all answers viewed by filter during the selected date range.	Action Date, Group, & Output Style
Top Phrases by Filter	Lists popular search phrases entered by filter during a selected date range.	Action Date, Group, & Output Style

If you click the link “Click here to access legacy reports” you will see a list of more system reports.


The following chart lists each report and describes the data contained therein.

Report	Description	Parameters
Issue Activity by Date	Shows the issue activity for the last 30 days. Helps you see which issues your customers view most often, including ones which might be good public answers.	State Date, End Date
Keyword Searches	Shows the activity of all keyword searches performed by your customers the last 30 days. Helps you see what most concerns your customers.	State Date, End Date

Expired Issue	This shows all issues that have expired within a certain date range	Start Date, End Date
Issue Staff Status	Displays a summary of issues based on specified staff and status values.	Status, Sort Order
Issue Summary by Date	Provides a complete listing of all issues added by date range.	Start Date, End Date
Staff Performance	Provides a review of how well your staff is answering your customer's questions.	Start Date, End Date
System Usage	Provides overall system activity status.	State Date, End Date
Issue Rating Information	Shows how people have rated the usefulness of specific issues, including their comments.	State Date, End Date

To generate a legacy report, simply click on the title of the report.

Request System Reports

To generate a report, select the  next to the corresponding report you would like to generate. Then, you will choose your selection criteria. For each system report the selection criteria will be different. Please see the list below to view the information on each Request System Report.

▶ Shared Reports

▶ Question and Answer System Reports

▼ Request System Reports

	Report Name	Description	Owner
	Average Time to Close	Lists the average time to close for all requests closed during the specified date range.	System
	Average Time to Close Trend	A trend analysis report detailing the average time to close over the specified time period.	System
	Closed Requests by Assigned Department	Closed Requests by Assigned Department	System
	Closed Requests by Assigned Staff	Closed Requests by Assigned Staff	System
	Closed Requests by Custom Field	Closed Requests by Custom Field	System
	Closed Service Requests by Department with Preferred Communication	Returns Closed Service Requests within a Date Range	System
	Open Requests by Assigned Department	Open Requests by Assigned Department	System
	Open Requests by Assigned Staff	Open Requests by Assigned Staff	System
	Open Requests by Custom Field	Open Requests by Custom Field	System
	Open Service Requests by Department with Preferred Communication	Returns Open Service Requests within a Date Range	System
	Period Summary	Lists all requests created or closed during the specified date range.	System
	Request Map	Request Map	System
	SLA	Lists the Required Completion Date of All Requests	System

Report	Description	Parameters
Average Time to Close	Lists the average time to close for all requests closed during the specified date range.	Create Date, Request Type, Charting, & Output Style
Average Time to Close Trend	A trend analysis report detailing the average time to close over the specified time period.	Start Date, Timeframe, Request Type, & Output Style
Closed Requests by Assigned Department	Closed Requests by Assigned Department.	Close Date, Request Type, Assigned Department, & Output Style
Closed Request by Assigned Staff	Closed Requests by Assigned Staff.	Close Date, Request Type, Assigned Department, & Output Style
Closed Requests by Custom Field	Closed Requests by Custom Field.	Close Date, Field Name, Value, & Output Style

Closed Service Requests by Department with Preferred Communication	Return Closed Service Requests within a Date Range.	Start Date, End Date, & Assigned Department
Open Requests by Assigned Department	Open Requests by Assigned Department.	Create Date, Request Type, Assigned Dept, & Output Style
Open Requests by Assigned Staff	Open Requests by Assigned Staff.	Create Date, Request Type, Assigned Dept, & Output Style
Open Requests by Custom Field	Open Requests by Custom Field	Create Date, Field Name, Value, & Output Style
Open Service Requests by Department with Preferred Communication	Open Service Requests within a Date Range	Start Date, End Date, & Assigned Department
Period Summary	Lists all requests created or closed during the specified date range.	Create Date, Request Type, Charting Detail, & Output Style
Request Map	Request Map	Create Date & Request Type
SLA	Lists the Required Completion Date of All Requests	Required Completion Date, Request Type, Assigned Department, & Output Style

Scheduled Reports

To create a scheduled report for any of the system reports simply click the  icon.

Report Schedule

Save and Continue Cancel

Additional schedule options may be specified after saving.

Schedule

***Report:** Average Time to Close

***Frequency:** On Demand

Comments:

1. Choose the report you would like to schedule to send out.

2. Choose how frequent you would like to send this report out.

Once you have completed 1 and 2 from above. Click the “Save and Continue” button.

Then, fill in the appropriate fields below:

Report Schedule

Save Delete Close

Schedule

Report: System Usage Report

Frequency: Weekly

Comments:

Enabled

Repeats Every: 1 week

On: Sunday Monday Tuesday Wednesday
 Thursday Friday Saturday

Start Date: 9/15/2008

End Date: No end date
 End after occurrences

Report: The report you would like to schedule to send out.

Frequency: Choose how frequent you would you like to send this report out.

Comments: Any details in regards to this scheduled report to note on.

Repeats Every: Choose how frequent you would like to send this report out (based on weeks).

On: Choose which day you would like the report to be sent out on.

Start Date: Choose the first day you would like the report to send.

End Date: You can choose “No End Date” which means the report will continue to send infinitely, “End after a certain amount of occurrences” which means the report will stop sending after it has been sent a certain amount of times, or you can choose a date that you would like the report to stop sending.

Selection Criteria

Activity Date

Occurs during

Occurs between and

Group:

Email Message Options

Send Time:

Send To:

Do not send to me

Subject:

Attachment Name:

Attachment Format:

Text:

Selection Criteria:

Choose the specific parameters for the selected report.

Email Message Options:

Send Time: Choose the time you would like the report to send.

Send To: Type in the email address you would like to send this report to. If you are sending the report to more than one person separate the email addresses by semi colon.

“Do Not Send To Me” Checkbox: If you don’t want this report to send to you as well as the email address above please check this box.

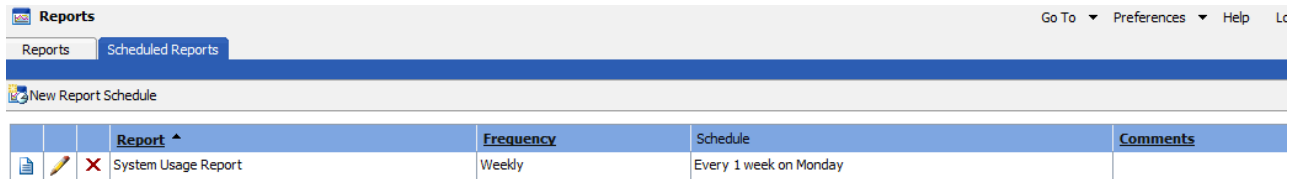
Subject: Type in the Subject of the email.




Attachment Name: The name of the attachment (report) you are sending.

Attachment Format: Please choose how you would like the report to send as: PDF, XLS, RTF, CSV, TXT

Text: Please type in any information you would like to send in the body of the email you are sending with report.

All of the scheduled reports will be listed under the “Scheduled Reports Tab”. See below:



Report ^	Frequency	Schedule	Comments
   System Usage Report	Weekly	Every 1 week on Monday	

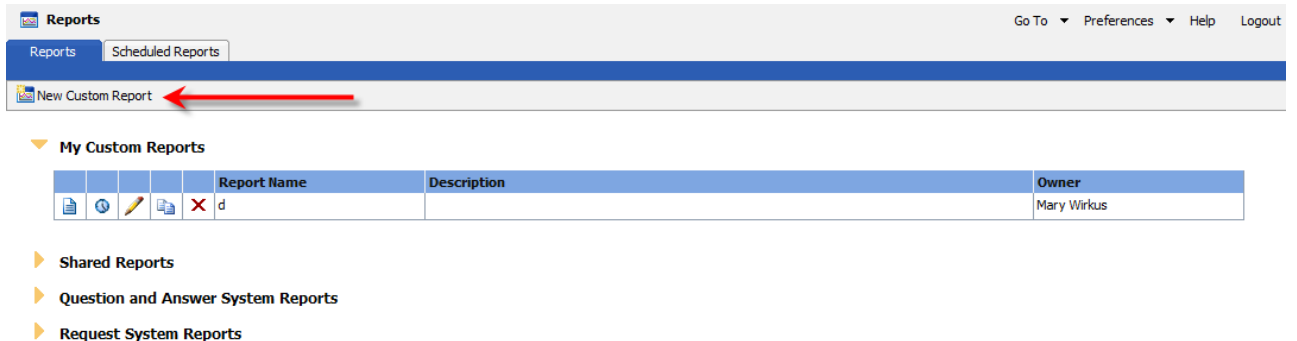
To view the scheduled reports click the  icon.






To edit a scheduled report click the  icon.

To delete the scheduled report click the  icon.


Custom Reporting

To create your own custom report please choose “New Custom Report”.



Report Name	Description	Owner
     d		Mary Wirkus

STEP ONE:

 **Report Wizard -- Details** Go To:

Enter a name and description for the report. The name will act as the report title and be used in lists to identify the report.

Name:

Description:

Choose the type of information to select for the report.

Datasource: (Choose if you are reporting on Answers, Questions, Question Activities, Requests, Request Activities, Customers, or Payments (if applicable))

Adjust the page size and layout to match your printer settings, viewing preferences or report design.

Paper Kind: (Choose Letter, Legal, or Ledger paper that you are printing the report on)

Page Layout: (Choose if you would like the layout of the report to be Portrait or Landscape)

Once this is complete, click “Next”, based on the “Datasource” that you chose above will affect the upcoming page.

STEP TWO:

Report Wizard -- Fields Go To: Fields

Choose the fields to include in the report.

Request Fields [Check All](#) | [Uncheck All](#)

<input type="checkbox"/> Assigned Dept	<input type="checkbox"/> Days Open	<input type="checkbox"/> Request Type
<input type="checkbox"/> Assigned Staff	<input type="checkbox"/> Group Name	<input type="checkbox"/> Required Completion Date
<input type="checkbox"/> Close Date	<input type="checkbox"/> Priority	<input type="checkbox"/> Source
<input type="checkbox"/> Completed/Closed	<input type="checkbox"/> Reference No	<input type="checkbox"/> Summary
<input type="checkbox"/> Create Date	<input type="checkbox"/> Request Status	<input type="checkbox"/> Update Date
<input type="checkbox"/> Created By		

Customer Fields [Check All](#) | [Uncheck All](#)

<input type="checkbox"/> Customer Address One	<input type="checkbox"/> Customer First Name	<input type="checkbox"/> Customer Phone
<input type="checkbox"/> Customer Address Two	<input type="checkbox"/> Customer Full Name	<input type="checkbox"/> Customer State
<input type="checkbox"/> Customer City	<input type="checkbox"/> Customer Group	<input type="checkbox"/> Customer Title
<input type="checkbox"/> Customer Create Date	<input type="checkbox"/> Customer Last Name	<input type="checkbox"/> Customer Zip
<input type="checkbox"/> Customer Email	<input type="checkbox"/> Customer Middle Name	


Location Fields [Check All](#) | [Uncheck All](#)

Cancel << Back Next >> Preview Finish

Choose the fields that you would like to display on your report. These fields are grouped by System Information (Request Fields), Customer Information (Customer Fields), Property/Location Information (Location Fields), and any additional Custom Fields you created for more information (Custom Fields).

Once you have chosen the fields that you would like to be displayed on your report click the “Next” button.

STEP THREE:

 **Report Wizard -- Field Options** Go To:

Adjust the display order of the fields or change the default headings and column widths below. Select the **Group** checkbox to organize the report in sub-sections.

Field	Heading	Width	Group	Sort	
Assigned Dept	<input type="text" value="Assigned Dept"/>	<input type="text" value="94"/>	<input type="checkbox"/>	<input type="text" value=""/>	<input type="button" value="▲"/> <input type="button" value="▼"/>
Assigned Staff	<input type="text" value="Assigned Staff"/>	<input type="text" value="94"/>	<input type="checkbox"/>	<input type="text" value=""/>	<input type="button" value="▲"/> <input type="button" value="▼"/>
Completed/Closed	<input type="text" value="Completed/Closed"/>	<input type="text" value="94"/>	<input type="checkbox"/>	<input type="text" value=""/>	<input type="button" value="▲"/> <input type="button" value="▼"/>
Create Date	<input type="text" value="Create Date"/>	<input type="text" value="94"/>	<input type="checkbox"/>	<input type="text" value=""/>	<input type="button" value="▲"/> <input type="button" value="▼"/>
Days Open	<input type="text" value="Days Open"/>	<input type="text" value="94"/>	<input type="checkbox"/>	<input type="text" value=""/>	<input type="button" value="▲"/> <input type="button" value="▼"/>
Reference No	<input type="text" value="Reference No"/>	<input type="text" value="94"/>	<input type="checkbox"/>	<input type="text" value=""/>	<input type="button" value="▲"/> <input type="button" value="▼"/>
Request Status	<input type="text" value="Request Status"/>	<input type="text" value="94"/>	<input type="checkbox"/>	<input type="text" value=""/>	<input type="button" value="▲"/> <input type="button" value="▼"/>
Request Type	<input type="text" value="Request Type"/>	<input type="text" value="94"/>	<input type="checkbox"/>	<input type="text" value=""/>	<input type="button" value="▲"/> <input type="button" value="▼"/>
Customer Full Name	<input type="text" value="Customer Full Name"/>	<input type="text" value="98"/>	<input type="checkbox"/>	<input type="text" value=""/>	<input type="button" value="▲"/> <input type="button" value="▼"/>

The fields you chose from Step Two will carry over on this screen to configure them in Step Three.

Field: This is the name of the field that you chose

Heading: Use the heading to change the name of the Field for your report.

Width: Customize the width of the column for specific fields. i.e. if you have information that is typically a lot you may want to make the width wider.


Group: Select the Group checkbox to organize the report in sub-sections.

Sort: Sort the field by ascending, or descending order.

Green Arrows: Select green arrows to adjust the order of the fields to display on your report.

Once you have configured each of the fields that you would like to be displayed on your report, click the “Preview” button to preview the report, or click the “Next” button.

STEP FOUR:

 **Report Wizard -- Selection Criteria** Go To: ▼

Make an entry in each of the visible fields and press the Add button to create a selection criteria rule. There is no limit on the number of rules. To match on any one of multiple values, hold the control key while making your list selections or separate text entries with the pipe character (|).

▼ ▼

Existing Criteria

Select the fields from the dropdown list box and enter a value for the fields.

- In order to use the “Or” function hold down the “CTRL” key while selecting from the 3rd drop down menu.

- In order to use the “And” function simply enter the criteria you need one at a time.

Click “Preview” button to preview the report, or click the “Next” button.

STEP FIVE:

Column	Function	Format String
Answer		
Answer HTML		
Assigned Dept		
Assigned Staff		
Category		
Close Date		
Create Date		
Created By		
Days Open		
End Date		
Forced To Top		
Group Name		

Choose the Function from the drop down list box, and then enter a Format String (for example: Total Items: {0}) for each Function and Column.

Sum: This function will add the numbers within the specified field.

Count: This function will count the line items within the specified field.

Average: This function will take an average of the numbers within the specified field.

Maximum: This function will give you the highest number within the specified field.

Minimum: This function will give you the lowest number within the specified field.

Click “Preview” button to preview the report, or click the “Next” button.

STEP SIX:

Report Wizard -- Chart

Go To: Chart

Use a chart to visually summarize the records that match your selection criteria.

Chart Type: None

Title:

Label Field:

Function: Count

Value as Percent

Cancel << Back Next >> Preview Finish

Chart Type: Select the type of chart for display on the report.


Title: Enter the title, or name for the Chart that will display on your report.

Label Field: Select the Field type from the dropdown list box that you would like to chart on.

Function: Select the Function you would like the chart to display.

Value as Percent: Check the box to have percentages shown on the report.

STEP SEVEN:

 **Report Wizard -- Sharing** Go To: ▼

Shared reports may be viewed or scheduled by staff other than the report owner. After making your selection, press the Finish button to save your changes and close this window.

Do not share

Share with department: ▼

Share with everyone

Do not share: This report will only be available for you to view.

Share with department: You can specify the department you would like to share this report with in which case, that department will have access to view the report.

Share with everyone: This report will be available for all of the staff members that are listed in the system.

Click “Preview” button to preview the report, or click the “Finish” button.