

## Create task report activities

### Activity 1: Create a note report with prompts

Create a Note report that you can use to search for user notes (i.e., comments or updates) or system notes based on the note content, the author, entry date, project name, or audit type. Name the report “Note Search.”

When using the Note Text prompt, this report will search within update threads to quickly extract any that meet the criteria specified in the prompts. When you run the report, you don't need to fill in every prompt, just the ones you care about. The blank ones are automatically ignored.

The view should include columns for:

- Note Text
- Audit Text
- Entry Date
- Owner: Name
- Audit Type
- Task Name
- Issue Name

Leave the filter tab blank.

Group on Project Name.

Include prompts for the following:

- Audit Text
- Note Text
- Owner Name
- Entry Date
- Project Name
- Audit Type

## Answer 1

1. Select **Reports** from the **Main Menu**.
2. Click the **New Report** menu and select **Note**.
3. In **Columns (View)** set up your columns to include:

### New Note Report

Report Settings ▾

**Columns (View)** Groupings Filters Chart

Show in this column:

Note » Entry Date

Note

- Attached Document ID
- Attached Issue ID
- Attachment ObjCode
- Attachment ObjID
- Audit Text
- Audit Type
- Document ID
- Entry Date

**Column Settings** Advanced Options Switch to Text Mode

Sort by this column **First** and sort it **Descending (Z-A)**

Summarize this column by:  
-- Select --

Done

**Column Preview** Apply an Existing View ▾ + Add Column

NOTE TEXT	AUDIT TEXT	ENTRY DATE	OWNER: NAME	AUDIT TYPE	TASK: NAME	ISSUE: NAME
Sample Text	Sample Text	4/15/11 3:16 AM	John Smith	Status Change	Train Inside Sales Team	Sync duplicating contacts

Save + Close Apply Cancel

- Note > Note Text
  - Note > Audit Text
  - Note > Entry Date
  - Owner > Name
  - Note > Audit Type
  - Task > Name
  - Issue > Name
4. Select the **Entry Date** column and change the **Sort to Descending**.
  5. In the **Groupings** tab, set the report to group by Project > Name.

# New Note Report

Report Settings ▾

Columns (View) **Groupings** Filters Chart

Group your Report:

Switch to Matrix Grouping | Switch to Text Mode

First by:

Project » Name

+ Add another Grouping

Collapse this grouping by default ?

## Grouping Preview

Apply an Existing Grouping ▾

+ Add Grouping

NOTE TEXT	AUDIT TEXT	ENTRY DATE	OWNER: NAME	AUDIT TYPE	TASK: NAME	ISSUE: NAME
Project » Name						
Sample Text	Sample Text	4/15/11 3:16 AM	John Smith	Status Change	Train inside Sales Team	Sync duplicating contacts

Save + Close

Apply

Cancel

6. Leave Filters blank.
7. Open **Report Settings** and name the report “Note Search.”
8. In the Description field, put something like, “Search for System or User notes based on the Audit Type selected and other prompts. System notes appear in the Audit Text column and User notes appear in the Note Text column.”

# Note Search

Columns (View) **Groupings** Filters Chart

Group your Report:

First by:

Project » Name [+ Add another Grouping](#)

Collapse this grouping by default ?

**Report Options**

Report Title  
Note Search

Description  
Search for either System or User notes based on the Audit Type selected and other prompts. System notes will appear in the Audit Text column and User notes will appear in the Note Text column.

Run this report with the Access Rights of:  
Start typing name...

When the Report loads, show the:  
**Details Tab** v

When the report loads on a dashboard, show:  
**200** v items

**Report Prompts**

**Done**

Status Change | Train inside Sales Team | Sync duplicating contacts

**Grouping Preview**

NOTE TEXT	AUDIT TEXT	ENTRY DATE	OWNER: NAME
Project » Name			
Sample Text	Sample Text	4/15/11 3:16 AM	John Smith

**Save + Close** **Apply** **Cancel**

9. Select **Details Tab** so that it displays when the report loads.
10. Set the report to show 200 items when the report is included on a dashboard.
11. Click **Report Prompts** and add:

## Note Search

Columns (View) **Groupings** Filters Chart

Group your Report:

First by:

Project » Name [+ Add another Grouping](#)

Collapse this grouping by default ?

**Report Options**

**Report Prompts**

- Note » Audit Text ×
- Note » Note Text ×
- Owner » Name ×
- Note » Entry Date ×
- Project » Name ×
- Note » Audit Type ×

[+ Add a Prompt](#)

Show Prompts in Dashboards

[Done](#)

**Grouping Preview**

NOTE TEXT	AUDIT TEXT	ENTRY DATE	OWNER: NAME
Project » Name			
Sample Text	Sample Text	4/15/11 3:16 AM	John Smith

[Save + Close](#) [Apply](#) [Cancel](#)

Status Change | Train Inside Sales Team | Sync duplicating contacts

- Note > Audit Text
- Note > Note Text
- Owner > Name
- Note > Entry Date
- Project > Name
- Note > Audit Type

12. Check the box for **Show Prompts in Dashboards**.

13. Save and Close your report.

## Activity 2: Create an admin team feedback report

This is an issue report that displays all the issues from a feedback request queue created for system admins. You can see how to create this request queue in the [Create a system admin feedback request queue](#) tutorial.

This report also uses a custom form. To learn how to create a custom form, see the [Create and share a custom form](#) tutorial.

This custom form should be created as follows:

Name: Admin process feedback

1. Process type (dropdown field)

- access levels
- approval process (global only)
- email notifications
- layout template
- milestone path
- project template
- reminder notifications
- request queue

2. Process name (single line text field)

3. Process grade (dropdown field)

- 1 - totally useless
- 2 - not very useful
- 3 - good but could be better
- 4 - excellent

4. Problem or good news (paragraph text field)

Create an issue report named **Admin team feedback report**.

The view should have the following columns:

- Issue: Name

- Primary Contact: Name
- Issue: Process type
- Issue: Process name
- Issue: Process grade
- Issue: Problem or good news
- Issue: Entry date
- Issue: Age
- Issue: Assignments
- Issue: Status

Group on Process type.

Filter on the ID of the request queue project where the feedback issues reside.

Name	Reported by	Process type	Process name	Process grade	Problem or good news	Entry	Age	Assignments	Status
Process type: Approval process (global only) (1)									
<input type="checkbox"/> New request approval process can't be rejected	Duck Phillips	Approval process (global only)	New request approval	2 - not very useful	When I reject a request queue request the status still says "New". Can you make the status say "Rejected" in this situation?	1/29/24	1 Day	Admin team	New
Process type: Project template (2)									
<input type="checkbox"/> Template was incomplete	Ann Owen	Project template	Expo Booth Template	4 - excellent	All job roles are in the template. Thanks!	1/29/24	1 Day	Admin team	New
<input type="checkbox"/> Template is incomplete	Ann Owen	Project template	Expo Booth Template	3 - good but could be better	There are no job roles included on any tasks, so we have to add them manually every time. Please provide job roles for each task where it makes sense.	1/26/24	4 Days	Joan Harris Admin team	Resolved

Showing 3 issues

## Answer 2

1. Select **Reports** from the **Main Menu**.
2. Click the **New Report** menu and select **Issue**.
3. In **Columns (View)** set up your columns to include:

The screenshot shows the 'Admin team feedback report' interface. The 'Columns (View)' tab is active, displaying a list of available columns on the left and 'Column Settings' on the right. The 'Primary Contact > Name' column is selected. The 'Column Settings' panel shows the 'Custom Column Label' field set to 'Primary Contact > Name' and the 'Field Format' set to 'Text'. Below this, there is a section for 'Column Rules' with an '+ Add a Rule for this Column' button. At the bottom, a 'Column Preview' table shows the selected column's data for a row with 'Sync duplicating contacts' and 'John Smith'.

NAME	OWNER: NAME	PROCESS TYPE	PROCESS NAME	PROCESS GRADE	PROBLEM OR GOOD NEWS	ENTRY	AGE	ASSIGNMENTS	STATUS
Sync duplicating contacts	John Smith					4/15/11			Resolved

- Issue > Name
- Primary Contact > Name
  - Note: this appears with “Owner:Name” as the column label. You can change this to “Reported by” by clicking on Advanced Options and typing “Reported by” in the **Custom Column Label** field.
- Issue > Process type
- Issue > Process name
- Issue > Process grade
- Issue > Problem or good news
- Issue > Entry date
- Issue > Age



- Issue > Assignments
- Issue > Status

4. Select the **Entry Date** column and change the **Sort to Descending**.

5. In the **Groupings** tab, set the report to group by **Issue > Process type**.

The screenshot shows the 'Admin team feedback report' interface. At the top, there are navigation links: Setup, Admin team feedback..., Projects, Admin team, and Pin current page. On the right, there are utility icons: Help, a grid icon, a star, a refresh icon, a search icon, and a menu icon. Below the title 'Admin team feedback report', there are tabs for Columns (View), Groupings (selected), Filters, and Chart. Under the 'Groupings' tab, the 'Group your Report:' section shows 'First by:' with a dropdown menu set to 'Issue > Process type'. There is a '+ Add another Grouping' link. Below this, there is a checkbox labeled 'Collapse this grouping by default'.

The screenshot shows the 'Grouping Preview' dialog box. It has a title bar with 'Apply an Existing Grouping' and '+ Add Grouping'. Below the title bar is a table with the following columns: NAME, REPORTED BY, PROCESS TYPE, PROCESS NAME, PROCESS GRADE, PROBLEM OR GOOD NEWS, ENTRY, AGE, ASSIGNMENTS, and STATUS. The table contains one row of data under the 'Issue > Process type' grouping: 'Sync duplicating contacts' reported by 'John Smith' with an 'ENTRY' date of '4/15/11' and a 'STATUS' of 'Resolved'. At the bottom of the dialog, there are three buttons: 'Save + Close', 'Apply', and 'Cancel'.

NAME	REPORTED BY	PROCESS TYPE	PROCESS NAME	PROCESS GRADE	PROBLEM OR GOOD NEWS	ENTRY	AGE	ASSIGNMENTS	STATUS
Issue > Process type									
Sync duplicating contacts	John Smith					4/15/11			Resolved

6. In the **Filters** tab, add a filter for the **Issue > Project ID** to equal the request queue project where the feedback issues reside.

Setup Admin team feedback... Projects Admin team Pin current page Help 6 ☆ ↺ 🔍 ☰

### Admin team feedback report Report Settings

Columns (View) Groupings **Filters** Chart

Set Filter Rules for your Report Switch to Text Mode Apply an Existing Filter

Only show me issues in which the...

Issue: Project ID Equal feedback for Feedback for System Admins

+ Add another Filter Rule

Save + Close Apply Cancel

7. Save and Close your report.