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.

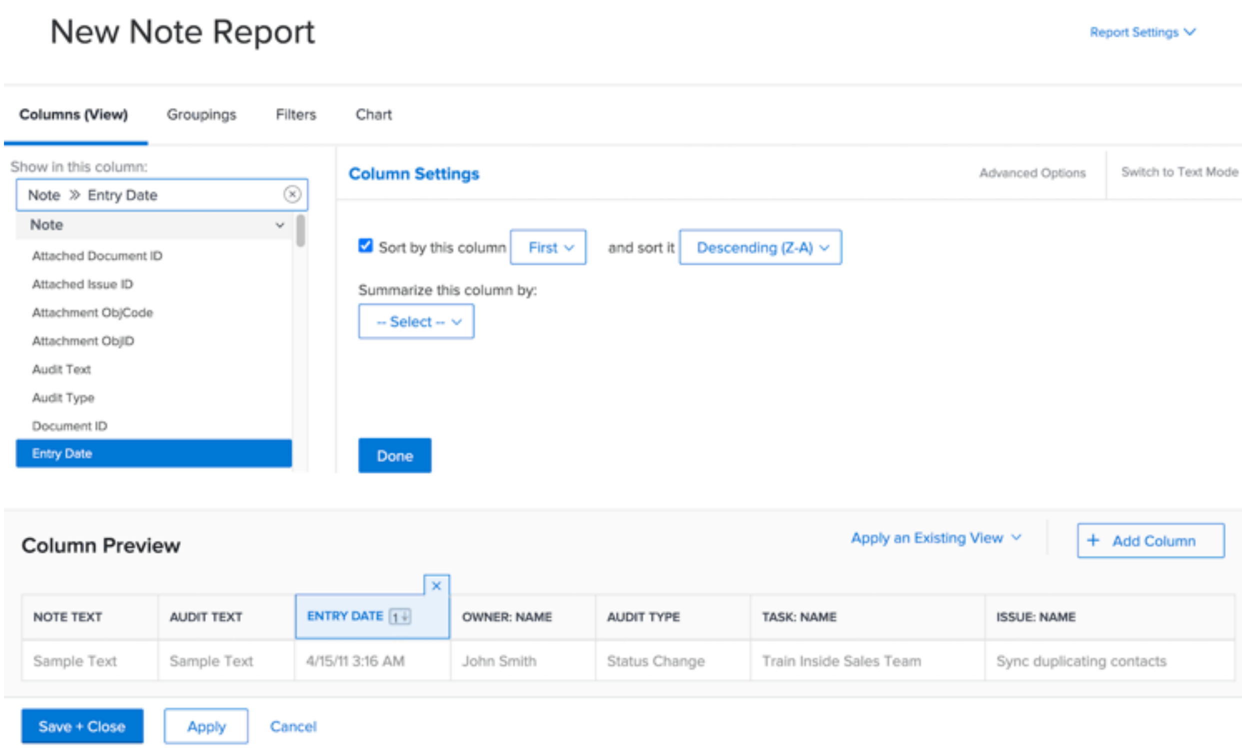
Group on Project Name.

Include prompts for the following:

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

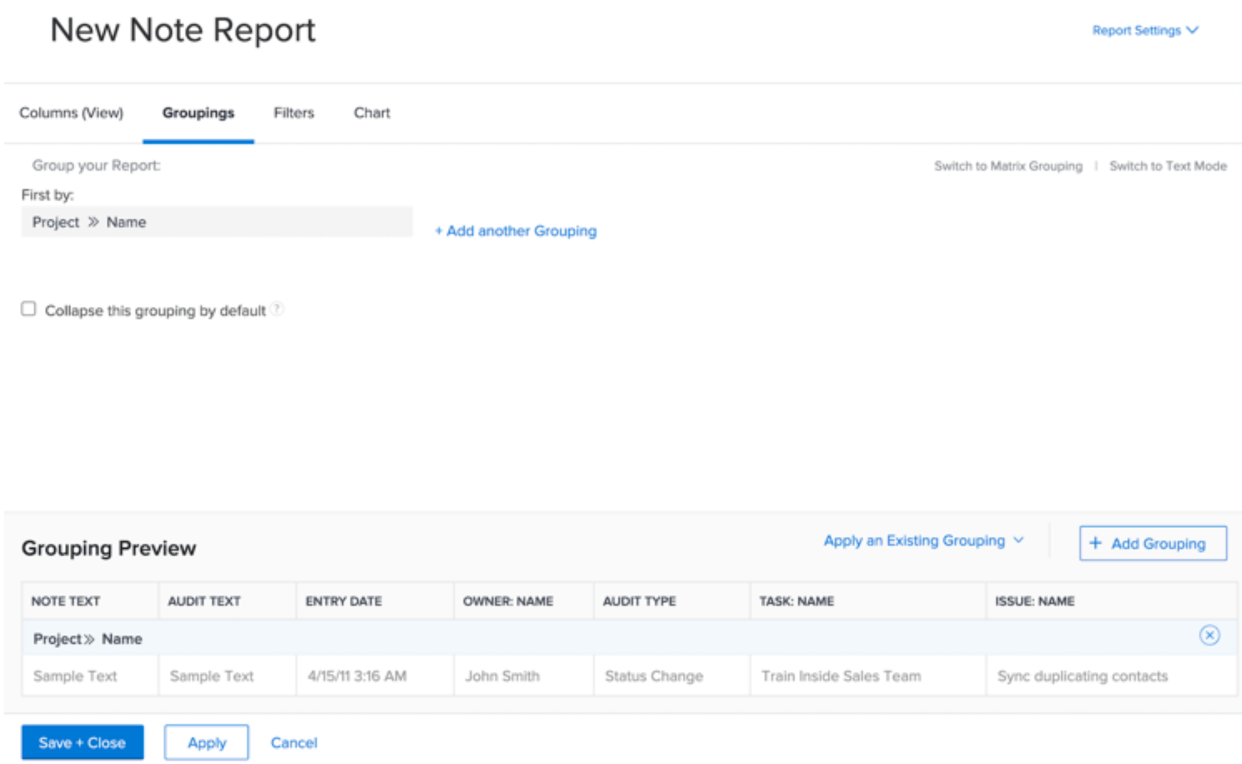
Answer 1

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:

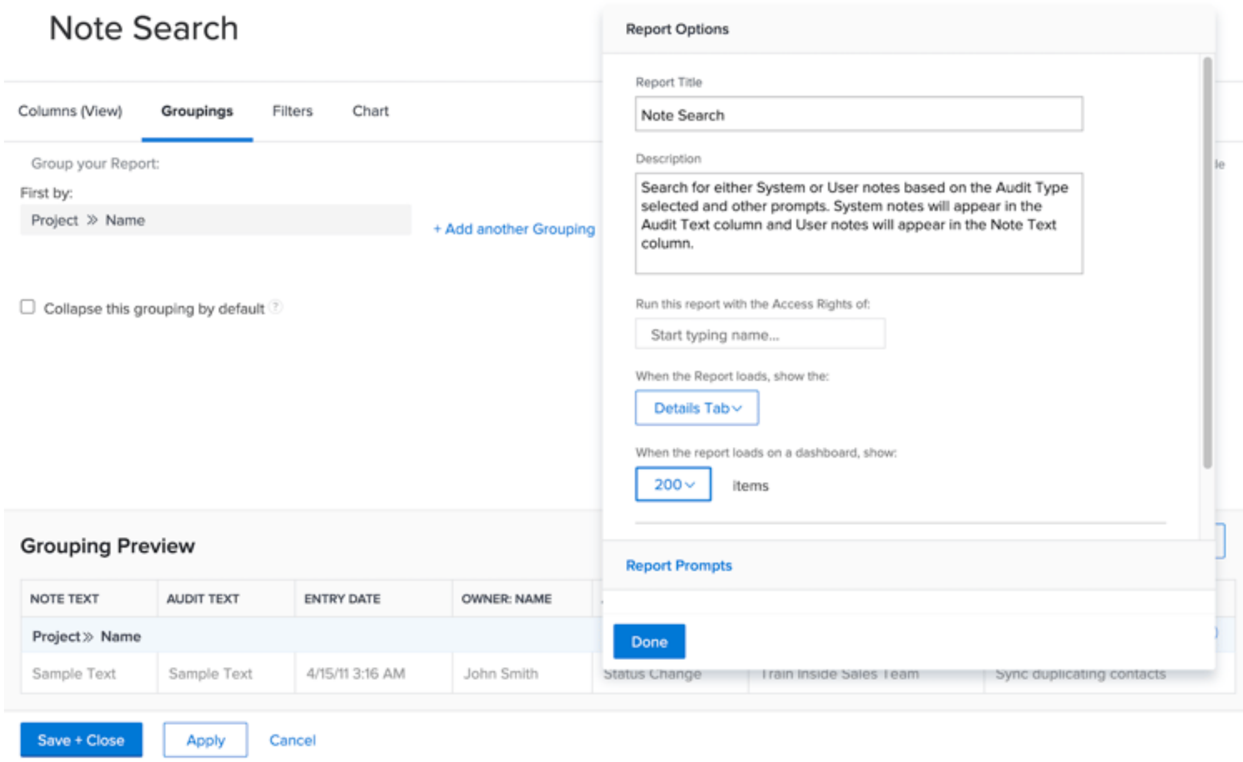


- Note > Note Text
- Note > Audit Text
- Note > Entry Date
- Owner > Name
- Note > Audit Type
- Task > Name
- Issue > Name

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.



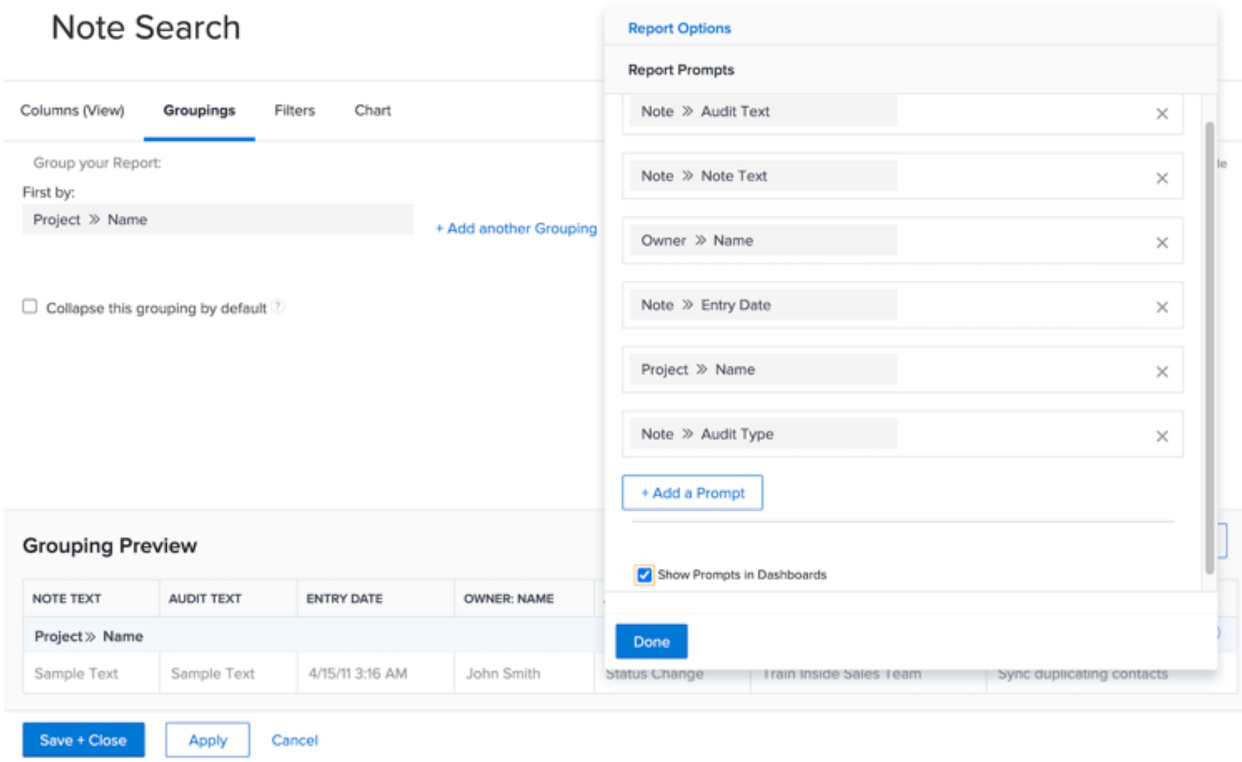
6. Leave Filters blank.
7. Open **Report Settings** and name the report "Note Search."
8. In the Description field, put something like, "Search for System or User notes based on the Audit Type selected and other prompts. System notes appear in the Audit Text column and User notes appear in the Note Text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



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 > 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**.

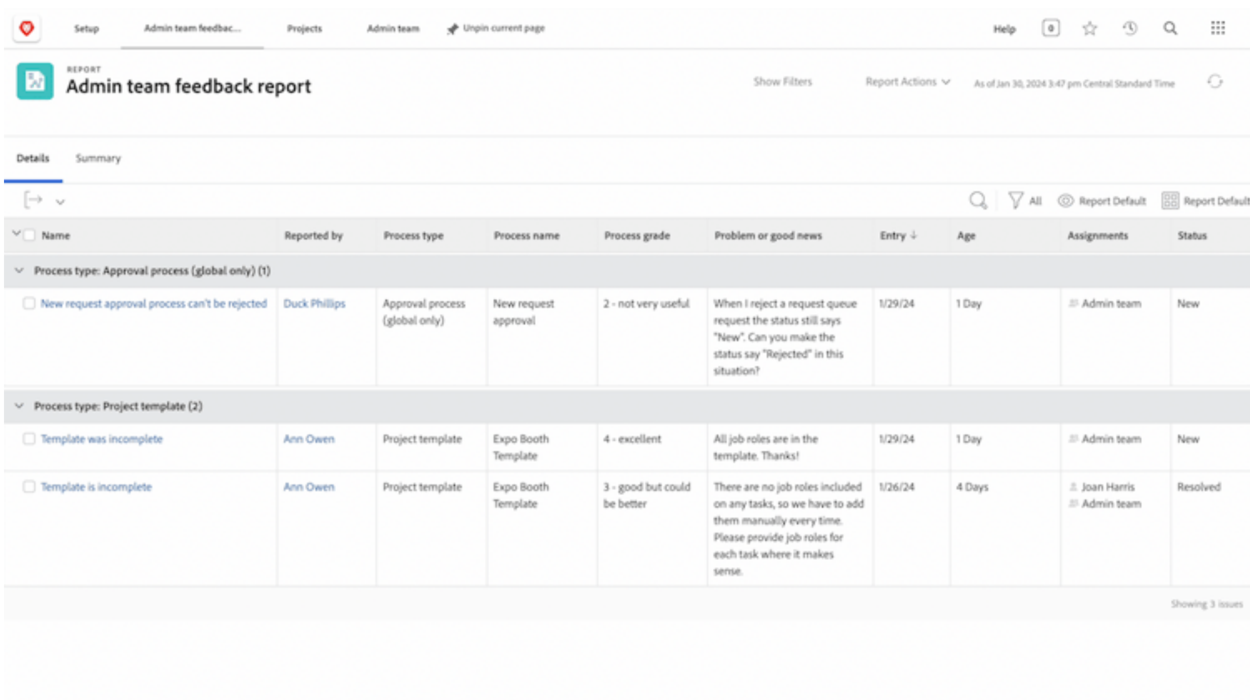
The view should have the following columns:

- 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

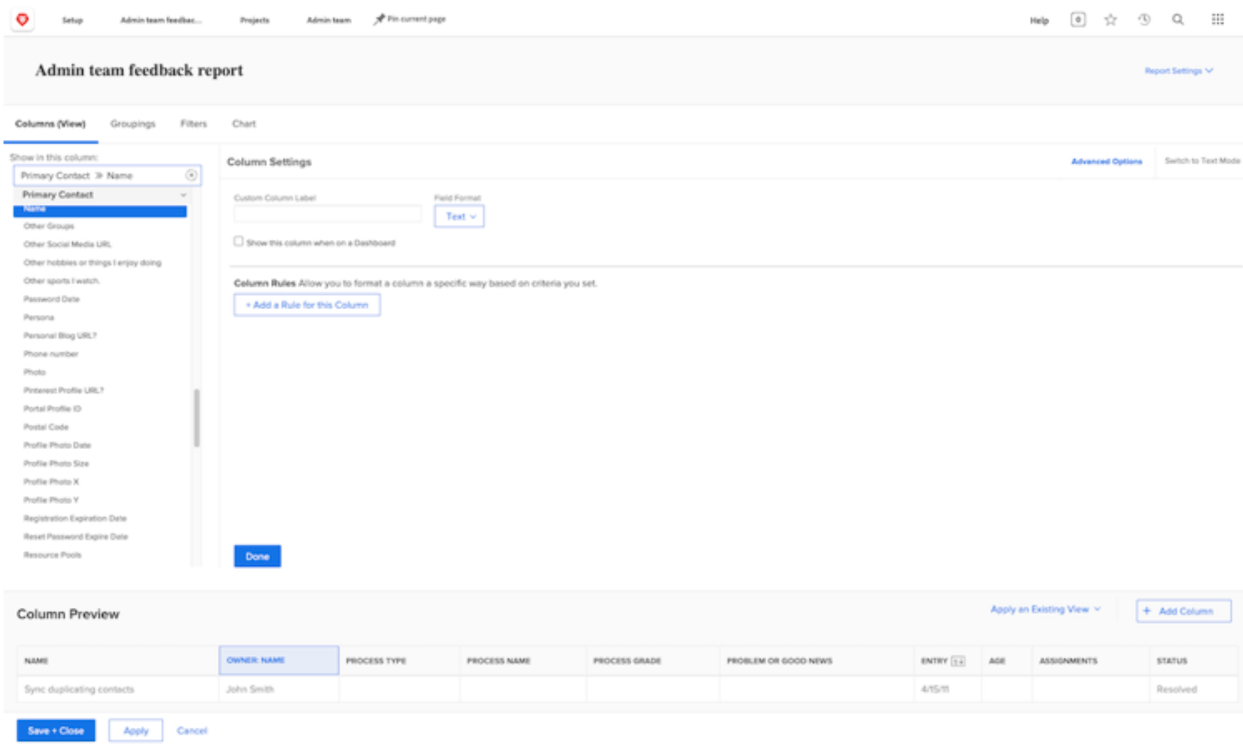
Group on Process type.

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



Answer 2

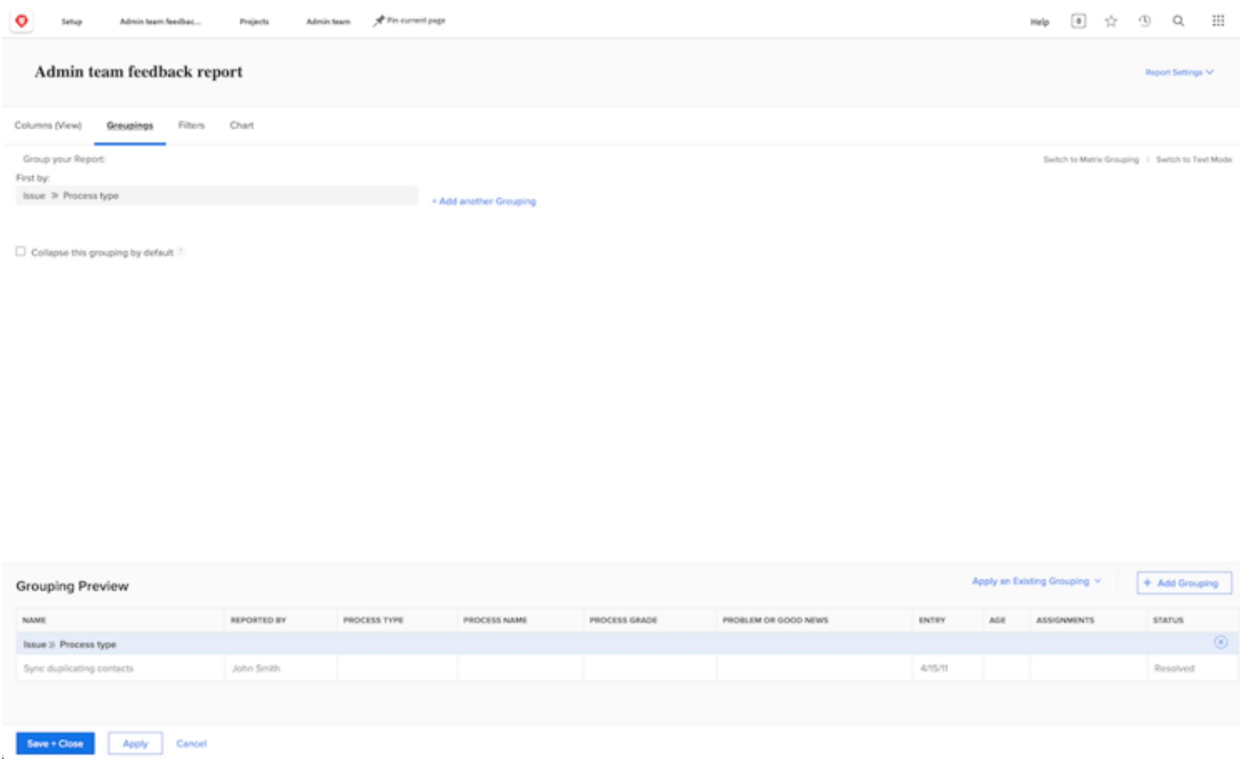
1. Select **Reports** from the **Main Menu**.
2. Click the **New Report** menu and select **Issue**.
3. In **Columns (View)** set up your columns to include:



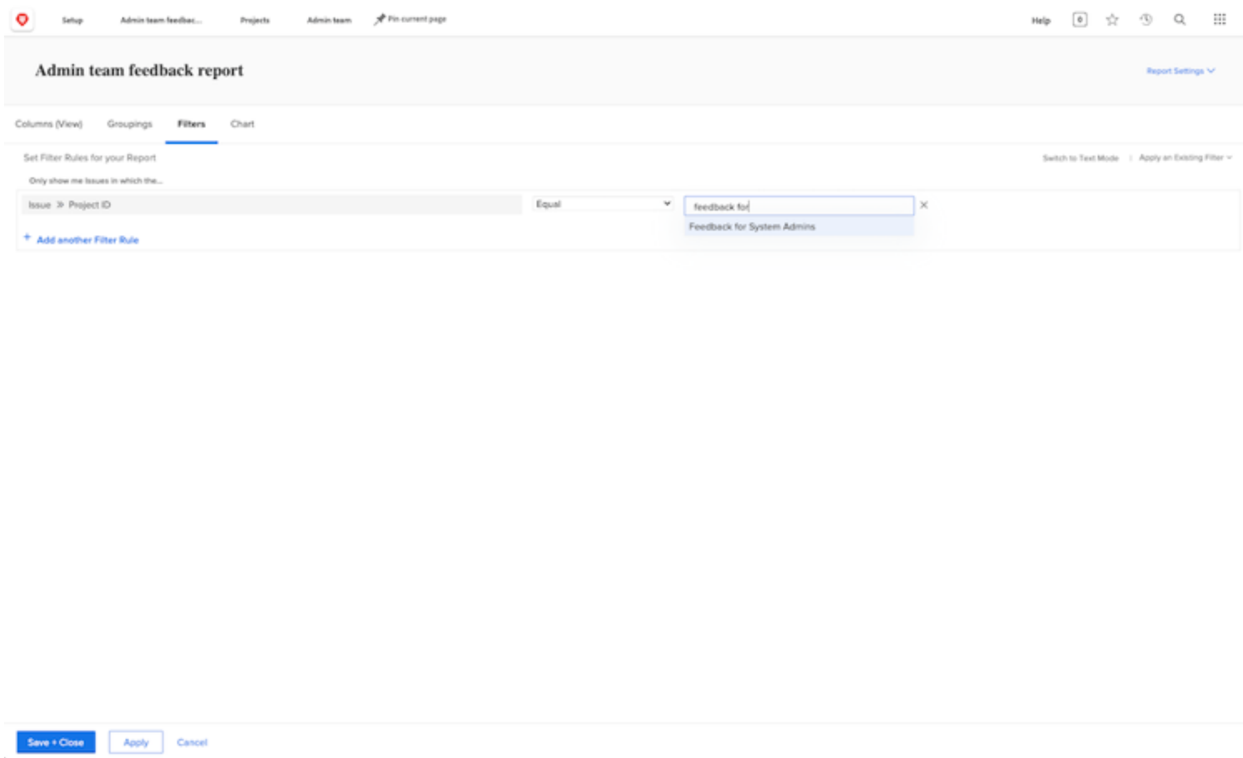
- Issue > Name
- Primary Contact > Name
  - Note: this appears with “Owner:Name” as the column label. You can change this to “Reported by” by clicking on Advanced Options and typing “Reported by” in the **Custom Column Label** field.
- Issue > Process type
- Issue > Process name
- Issue > Process grade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



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



7. Save and Close your report.