Guide to Creating Reports for DNA Helpdesk

NetSupport Limited
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Introduction

When using Helpdesk applications, there usually comes a point where the standard information provided, doesn’t answer all the questions you want answered, nor does it provide you with the statistics that you now require.

This is why DNA Helpdesk provides you with the ability to import Reports created with the globally renowned reporting application Crystal Reports.

Crystal Reports enables you to provide detailed statistical reports, which can be easily accessed within the DNA Helpdesk user interface.

This document is to show both report designers and DNA Helpdesk administrators, how to both create Crystal Reports against your DNA Helpdesk database, and then how to import your created reports into DNA Helpdesk.

Creating a Database Connection

The first action you must take before you can start creating a report is making a connection to the DNA Helpdesk database.

When starting up Crystal Reports, you will be asked to choose what report type you would like to use, any report type can be used to create a connection to the DNA Helpdesk database.

The first step you will need to take is to create a connection to the NetSupport DNA Helpdesk Database. The recommended connection method to connect to the DNA Helpdesk Database is OLE DB, due to this being the quickest of the connections options.

Once you have selected the report type you wish to use, you will be greeted with the above creation wizard window. Expand the “Create New Connection”
Tab, and scroll down to OLE DB (ADO). Extend the “OLE DB (ADO)” Tab; double click on the “Make new Connection”. Within the next window, highlight “Microsoft OLE DB Provider for SQL Server” and Click Next.

You will now be given the above window, which you will need to fill in with your specific SQL Server and NetSupport DNA Helpdesk Database information.

Server: “DNA Helpdesk Server IP Address”
User ID: “SQL Server User ID”
Password: “SQL Server Password”
Database: DNAHelpdesk

Click Finish

Your DNA Helpdesk Connection will now be added to the Current Connection Tab, Expand this and you will be shown the Database Structure of NetSupport DNA Helpdesk.
Click OK to Save the DNA Helpdesk Connection
You are now at a point where you can start selecting the database tables you wish to query against within your Report.

Please refer to the Database Structure document for details regarding what information is held within each Database table.
Creating a Basic Report

You have now created a connection to your NetSupport DNA Helpdesk Database and you are at a point where you can start creating your report.

This section will explain how to create the “Closed Calls” report, which is available within NetSupport DNA Helpdesk.

Go to the toolbar and expand the “Database” Tab, click on “Database Expert…”

Within the open window, expand the “Current Connection” Tab, and you will be shown your DNA Database’s Server name (If your database is not shown within Current Connections, please review the creating a database connection documentation), expand this and then also expand “DNA Helpdesk”, “dbo” and “views”.

Select “TicketList”, so that it is highlighted then click on the > button. This will move the “TicketList” table into the Selected Tables section. Tables within the Selected Tables section are now available to be used within the report and click ok.

Before Starting a Crystal Report ensure that the report is set to Design Mode and not Preview Mode. To change the report to Design Mode, Expand “View” from the Toolbar and Click “Design”.

You are now at a point where you can start creating your report.

Go to the toolbar and expand “Report” and Click “Select Expert”, within this section you can perform filters to the report so that the report will only show selected data, when the DNA Helpdesk database is queried.
Expand “TicketList” and highlight “Closed”, then Click Ok and you will be given the below window:

For the ability to only show closed calls within the report set “TicketList.Closed” is equal to 1.00. (1 is closed, 0 is not closed) Then click “ok”.

When the report next queries the database, the report will perform a search through the NetSupport DNA Helpdesk database and will only report tickets with the status of “Tickets in this status are marked as closed”. You can verify which statuses have this option enabled by viewing the Status Menu within the Admin Section of the DNA Helpdesk.

Now you have selected the Filters on the Data you wanted shown within the report, you now need to add what information you want the report to show. Activate the Field Explorer (Go to the Toolbar and Expand View then Click on Field Explorer).
Expand “Database Fields” and then “TicketList” within the “Field Explorer”. Then Drag and Drop the following database fields into the “Details” Section of the Report:

- AssigneeFullName
- TicketID
- Summary
- Date Closed

Next we will add a Group for the report, so that you can supply summary Group figures for calls Closed by Assignee.

Go to the Toolbar and Expand “Insert” then Click “Group…”

Click on the first drop down box and change this to “TicketList.AssigneeFullName”, leave the secondary box as “in ascending order.” as Shown above, Click “OK”.

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Next move the Field Headers from the “Page Header” Section into the newly created Group Header #1 section. (Please Note you will need to expand the Group Header #1 section.)

Now we are going to create a Summary Amount for the Assignees. Go to the Toolbar and Expand “Insert” then Click “Summary…”

Within the Insert Summary Section, set the Chosen summary file as “TicketList.TicketId”, then Calculate Summary should stay as “Sum” and then Change the “Summary Location” to Group #1, Click “OK”.

This will create a Summary Box named “Sum of TicketList.TicketId”, which will perform a count of how many calls have been closed by a particular Assignee.
The Summary will be currently shown with 2 Decimal Places (i.e. 1.00). To change this right click on the “Sum of TicketList.TicketId” (The Summary field you have just created) and Click “Format Field”. Click on the “Number” Tab, then Click “Customize…”, Click on the Number Tab, and Change the Decimals to None (i.e 1). Click OK to save the Settings.

Next we are going to place a Text Box to show what the Summary Value states. Expand “Insert” from the Toolbar and Click “Text Object”. Place the “Text Object into the Group Footer #1 section.

Then input the following text, “Total for:”. Then Drag and Drop the Group #1 Name from the Field Explorer (where) into the Text Box (as shown above). The Group #1 Name will then be replaced with the Assignee Full Name when the Report is viewed in Preview mode.

To Preview your report click on the Lightning Button.
How to Upload Crystal Reports into DNA Helpdesk

Once you have created a Crystal Report for DNA Helpdesk, you are then able to import the Report into DNA Helpdesk, so that Helpdesk Users who have access to Reports within DNA Helpdesk can review your created report.

To Upload the Report, login to the DNA Helpdesk as an Administrator User.

Expand “Reports” and Click “Explore”

Expand “Standard Reports” and Select the folder, where you would like your Report to be added into.

Click “New Report” and you will be greeted to the below Window.
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Click “Browse” on the “Report File” section, and Explorer to the location your Crystal Report is located.

Then Input a “Report Description”, this will be the name shown for the Report within DNA Helpdesk.

Click Add to Upload the Report.
Securing Crystal Reports within DNA Helpdesk using Permissions

For some of the Reports either within DNA Helpdesk or that you have created for DNA Helpdesk, you may not want all Users of DNA Helpdesk to have access.

Due to this it is possible to apply permissions to Report Folders within DNA Helpdesk.

To apply the report permissions within DNA Helpdesk, login as an Administrator User.

Expand “Reports” and Click “Explore”

Expand Standard Report and Select the Report Folder you wish to apply permissions, then Click “Permissions”.

This will show, which users are currently able to access the Reports.

Highlight Everyone within the Permissions Window and Click “Remove”. *(Please note if you were to click “OK” now, currently no one would be able to view the reports within the selected report folder.)*

To allow specific users, departments or to re-enable everyone to view the Reports within the selected report folder, Click “Add”, which will provide you with a Hierarchy view of your DNA Helpdesk Users and Departments.

To add the specific users or departments to view the reports within the selected folder, highlight the User or Department then Click “OK”. This will then allow the User or Department to view the reports from the selected report folder, continue adding Users or Departments using this method until you have selected the required users or departments.

N.B. *(Please note if the User does not have Permission to Read Report within the Admin User Section, they will not be able to access the Report even if the Permissions are set to Everyone)*
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Crystal Report Parameters

Within Crystal Reports it is possible to create parameters, which allow users to review the reports to use their own specified criteria.

An example of a parameter that can be used in Crystal Reports for DNA Helpdesk is Date Range.

Below are details of how to create a date range parameter in Crystal Reports based on Closed Date within DNA Helpdesk.

Within the “Field Explorer”, Right Click on “Parameter Fields” and Select “New”.

Apply the Parameter Field name with a suitable name (i.e. Start Date), input prompting text, this will be shown to the user advising them what to input for the parameter. Then change the “Value type” to “Date”.

Then create another parameter for End Date, using the details provided above.
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To define the report to only use the date ranges specified, within the “closed dates” parameter you need to apply a selection formula.

To set the selection formula, expand “Report” in the toolbar, expand “selection formulas” and select “Record”…

Then input the following Line:

{TicketList.DateClosed) in {?Start Date} to {?End Date}

**NB.** If you are using an alternative parameter name, the parameter name can be selected from the Report Fields as shown below.

Please note you will need to include the word “and” if you have other selection formulas.

When you save your selection formula, you will then be presented with a parameter request. Click “Close” to return to the design window.

Then Select the Start Date and End Date you would like the Report to query against.

Clicking Ok, once you have selected the Date Ranges.
DNA Helpdesk special variables

When creating Reports for DNA Helpdesk within Crystal there are special variables that gather their information from the DNA Helpdesk settings.

An example special variable within DNA Helpdesk is “TicketName”, this variable allows the Crystal Report to use the Ticket Name, that has been specified within the Customise section of the DNA Helpdesk.

To use a special variable within a Crystal Report, the variable has to be created as a parameter.

Below are details of how to incorporate the Ticket Name variable within a Crystal Report.

Within the Field Explorer, Right Click on “Parameter Fields” and Select “New”

Set the Parameter Field name to the Special Variable name, which in this example is TICKETNAME. Click ok to complete.

Once the Special Variable has been created, you can add the parameter into the report using the same method as other database fields, by dragging and dropping.
As the TICKETNAME parameter is unlikely to be used by itself, the parameter can also be inputted into a Text Object.

To add a text object into a Crystal Report. Expand “Insert” from the Toolbar and Select “Text Object”. Once placed you can then drag and drop the TICKETNAME parameter into the text object.

When you click on “Preview” to view the Report, it will now request a parameter value for TICKETNAME, this will only occur when viewing the Report from Crystal Reports, once the report has been imported into DNA Helpdesk, the Parameter value will be automatically gathered from the DNA Helpdesk.
Please review below the other Special Variables from DNA Helpdesk that can be used within Crystal Reports with a description of what they perform:

<table>
<thead>
<tr>
<th>Parameter Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONTACTID</td>
<td>This will automatically be populated with the ContactId value from the HD_Contact Table for the logged on user</td>
</tr>
<tr>
<td>DEPTARTMENTID</td>
<td>This will automatically be populated with the DeptId value from the HD_Contact Table for the logged on user</td>
</tr>
<tr>
<td>COMPANYID</td>
<td>This will automatically be populated with the ComptId value from the HD_Dept Table for the logged on user</td>
</tr>
<tr>
<td>REPORTTITLE</td>
<td>Uses the Name of the report from the HD_Reports Table</td>
</tr>
<tr>
<td>SELECTEDCONTACT</td>
<td>Prompts for a Contact from the HD_Contact Table by producing a Dropdown list</td>
</tr>
<tr>
<td>SELECTEDOPERATOR</td>
<td>Prompts for a Contact from the HD_Contact Table where the Contact is a Helpdesk Operator by producing a Dropdown list</td>
</tr>
<tr>
<td>SELECTEDDEPARTMENT</td>
<td>Prompts for a Department from the HD_Dept table by producing a dropdown list</td>
</tr>
<tr>
<td>SELECTEDCOMPANY</td>
<td>Prompts for a Company from the HD_Comp table by producing a dropdown list</td>
</tr>
</tbody>
</table>
Further Information

If you require any further information regarding NetSupport DNA Helpdesk, you can contact the NetSupport Technical Support Team using the following details:

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