

Exports in ServiceDesk

ServiceDesk has a plethora of exports, available from a variety of contexts. From day one, it's been our practice to add exports as users request them. In result, it soon reached the point where even the main programmer (yours truly, Glade Ross) had difficulty keeping track of exactly what exports were available, and where. In fact, more than once I went to all the trouble of spending hours building a new export, only to discover later I'd already created an older version that achieved essentially the same purpose (man, I hate that).

This document was started in September '09 to provide a single-source location for keeping track of what all the exports are, and what they entail. As of its initial inception, I am only adding information about the *Export Miscellaneous Data* form. I plan to add info regarding other exports later — with the aim to eventually make this document comprehensive.

Please bear in mind there is a counterpart to this document whose design is to be a review/description of all the *reports* in ServiceDesk. It may be found via a dedicated button in ServiceDesk's Reports form (F11), or via this link:

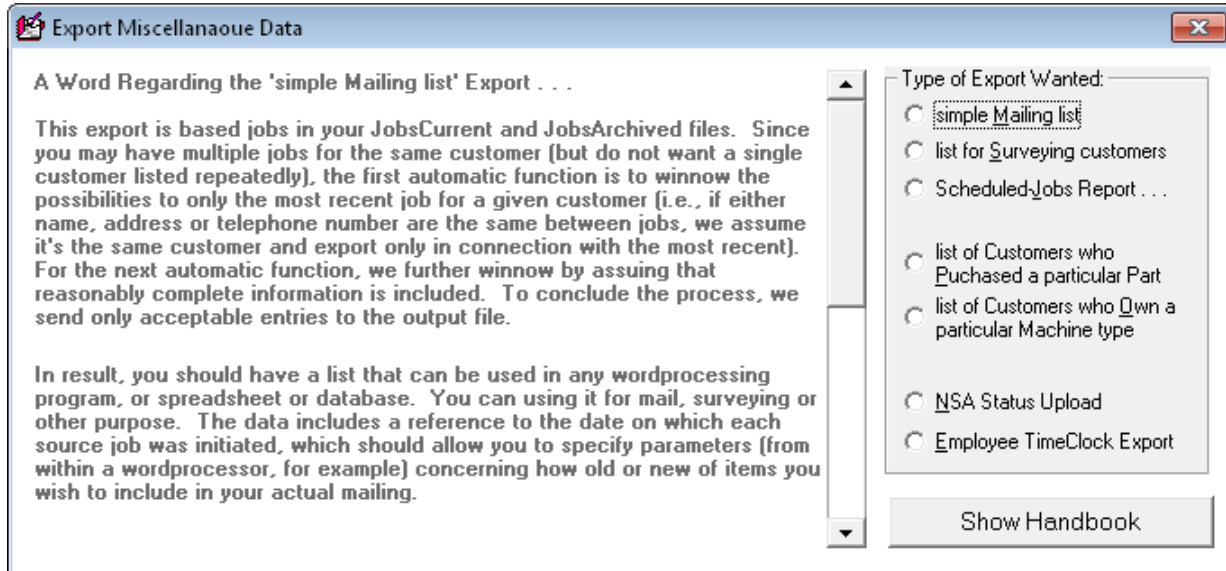
<http://rossware.net/MiniManuals/Exports%20as%20Provided%20in%20ServiceDesk.pdf>

Reports are distinguished from mere exports in that they *analyze* data, compiling sums, ratios, making comparisons, and so on — to give you digested analytics. Mere exports, by contrast (and as described here), simply pull selected elements of data (compiling them typically in an Excel or similar format) giving you the opportunity to make any such further external use of the pulled data as you may wish to make.

Chapter 1

The Export Miscellaneous Data Form

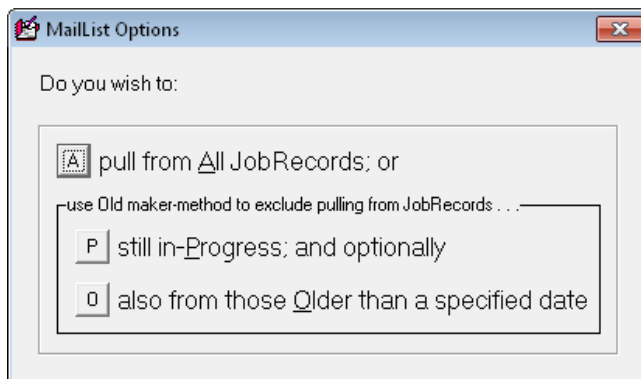
This form (shortcut access is Alt-F3) features a gathering of exports — in particular, ones for which there is no more sensible home in a contextually operable area of ServiceDesk.



We'll briefly review each:

The Simple Mailing List:

This is exactly what the title implies. If you want to send out a mailing to your customers, this export is designed to give you the needed list. It uses behind-the-scenes algorithms to assure you will not be sending multiple items to a single address or party. When you select for this export, you'll see these options:



This first option produces a comprehensive list, formulated on the basis your entire set of JobRecords within ServiceDesk. It runs with considerable speed (i.e., should not take all day to churn through even a large database) and has no limit in the number of records it can ultimately output. Normally, it's the method you should use. Assuming you wish to limit your mailings to customers for whom you performed jobs within a limited range of time, it's a result that can easily be manipulated after the export completes (i.e., you may easily edit from within the result itself, or, within the mail-merge program you use, you may simply specify the date-range of interest).

The second and third options use a much older underlying method. That older method churns through the data with much less efficiency and speed, and cannot produce more than 32,767 records in output. Initially, upon having created the newer method (which is now listed as the first offering), we entirely eliminated the old. We brought it back when certain users objected (basically, these users did not want to use the methods as above-described to limit their mailed output).

List for Surveying Customers:

This was developed a long time ago for a particular user that wanted a list optimized for surveying customers to discover their degree of satisfaction. The thinking was, a particular set of fields were needed from completed jobs, at which a surveying person could look while make survey-type calls. The fields are:

CstmrName, City, TelNumber, DateOfLastVisitOnJob, TypeOfMachine,
TechWhoFinishedJob, GridRef, Description, Address, Email

These days, we think the survey system as built into *SD-CyberOffice* represents a dramatically superior method for surveying customers. We are unsure if anyone remains an active user of this export.

You may wonder, by the way, why an export such as this one would not be as suitable as the *Simple Mailing List* for sending mailers to customers (you may notice, after all, it includes customer name and address). The reason is, suppose you did two jobs for the same party within the period for which you want to produce mailers. The *Simple Mailing List* will produce only one line-item for that customer, in spite of the two jobs. All other exports will produce a line-item for each job. Other scenarios are sensibly managed as well (as needed for ordinary mailer purposes) that are not otherwise managed in the other exports.

Scheduled Jobs Exports:

There are actually five numbered sub-types under this heading. In each of these, the emphasis is distinguished from the *List for Surveying Customers* in

that, while the date-of-interest there is on when the tech did his last visit (as applicable to the job), for this series it's on the date when the service order was initially received. Thus, this series fits if your interest is in evaluating (or otherwise working upon) a set of jobs *as received* within a particular period of interest.

Beyond that distinction, the explanation for the fact this species consists of a numbered series is simple. First one user wanted an export (and of this type) featuring a particular set of fields. Then another user wanted one of similar type, but with a different set of fields, and so on. Thus, over time we ended up with five different types. Here is a listing of the particular field outputs for each:

Type-1 (good basic data)

DtTaken, NmLst, NmFrst, CtyAbbrv, TelNmbr1, TelNmbr2, TelNmbr3, Make, Model, Serial, PurchaseDt, Symptoms, WhenSchldd, InvNmbr, PayingParty, Address, CityStateZip, EmailAddress, Department, KeyWordDsgntdAsRecall?

Type-2 (emphasis on simplicity)

DtTaken, DtCmpltd, InvNmbr, Technician, CnsmrName, Make, Type, Model, Serial, PayingParty, PO # if applicable, CallTaker

Type-3 (includes fields analyzing appointment performance, completions, revenue, some parts usage info, plus MyCriteria data)

InvNmbr, ShopJob?, NmLst, NmFrst, Address, CityStateZip, Email, TelNmbr1, TelNmbr2, TelNmbr3, PayingParty (if other), PayingPartyPoNmbr, Type, Make, Model, Serial, PurchaseDt, Dealer, Symptoms, Department, TechCode, OriginDesk, OriginDate, FirstAppmnt, CmpltnDate, DysOrgnToFrstAppmnt, DysOrgnToCmpltn, DysFrstAppmntToCmpltn, TtlPartQty, TtlPartCost, Part1Qty, Part1Nmbr, Part2Qty, Part2Nmbr, Part3Qty, Part3Nmbr, Part4Qty, Part4Nmbr, Part5Qty, Part5Nmbr, LaborRate, TimeOnJob, WorkDescription, MyCriteria [fields and values].

Type-4 (otherwise somewhat more limited than Type-3, but with enhanced emphasis on parts-usage data)

InvNmbr, NmLst, NmFrst, PayingParty (if other), PayingPartyPoNmbr, Type, Make, Model, Serial, PurchaseDt, Dealer, Symptoms, Department, TechCode, OriginDesk, OriginDate, QtyOfTrips, TtlPartQty, TtlPartCost, Part1Qty, Part1Nmbr, Part1Cost, Part2Qty, Part2Nmbr, Part2Cost, Part3Qty, Part3Nmbr, Part3Cost, Part4Qty, Part4Nmbr, Part4Cost, Part5Qty, Part5Nmbr, Part5Cost

Type-5 (everything but the kitchen sink [specifically, all of 3 and 4, combined])

InvNmbr, ShopJob?, NmLst, NmFrst, Address, CityStateZip, Email, TelNmbr1, TelNmbr2, TelNmbr3, PayingParty (if other), PayingPartyPoNmbr, Type, Make, Model, Serial, PurchaseDt, Dealer, Symptoms, Department, TechCode, OriginDesk, OriginDate, FirstAppmnt, CmpltnDate, DysOrgnToFrstAppmnt, DysOrgnToCmpltn, DysFrstAppmntToCmpltn, TtlPartQty, TtlPartCost, Part1Qty, Part1Nmbr, Part1Cost, Part2Qty, Part2Nmbr, Part2Cost, Part3Qty, Part3Nmbr, Part3Cost, Part4Qty, Part4Nmbr, Part4Cost, Part5Qty, Part5Nmbr, Part5Cost, LaborRate, TimeOnJob, WorkDescription, MyCriteria [fields and values] . . .

List of Customers who Purchased a Particular Part:

The purpose of this export is to facilitate marketing to customers that purchased a particular part. You will indicate the partnumber of interest, and the system will produce an export with the following fields:

CstmrNm, Address, CityStateZip, CumulativeQtyPrchsd, MostRecentPrchsDt, ApplcblPrtNmbr

You can then use the output for whatever purpose your marketing imagination may conjure.

List of Customers who Own a Particular Machine Type:

This is a reasonable parallel of the above-described, though with the obvious indicated distinction. It produces this set of fields:

CstmrNm", "Address", "CityStateZip", "DateOfMostRecentJob", "SelectiveCriteria", "Model", "Serial", "PurchaseDate

One thing to bear in mind, in regard to the purpose here, is there is another export you might prefer, for essentially the same purpose as you might think to use this one, but in a mode that might provide greater flexibility. The *UnitInfo* form (shortcut is Shift-F12) has its own data export. That one is comprehensive. If working from it, you could fully customize your filtering criteria (either in Excel or in your mail-merge application), as opposed to working via the limited filtering as available via this export.

NSA Status Upload:

NSA stands for *National Service Alliance*. If you are contracted with that entity and are required to upload to it the status of jobs it has dispatched to you, this is the export to use for the purpose.

Employee TimeCard Export:

Use this if you want to perform analysis on your employees' TimeCard data, independent of what's otherwise provided from within ServiceDesk.