## MarkeTrak Users Guide

Section 9: Background Reports

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1. Background Reports

## Required Fields for Background Reports



## Description of Background Reports

The Background Reports will provide the following functionality:

* Increase number of exportable rows when running a report
* Allow users to run a report and work in the GUI at the same time
* Allow users to search multiple inputs within each search criteria category and have issues returned in a report format, for example:
  + - * + Multiple Issue IDs
        + Multiple ESI IDs

The report will execute in the backend system and a CSV file will generate with the results. The report can be attached to an issue or it can be posted to the Reports and Extracts Index in MIS. If the output CSV file exceeds 10MB in size, the report will automatically post to MIS.

Background Report Issues can be executed and retrieved via the API.

**List of Reports**

|  |  |  |
| --- | --- | --- |
| Report Name | Report Description | Parameters |
| Average Days Open | Report to Provide average days open by subtype for the time frame specified. | **Parameter 1**: (First Available Date) (optional): Only issues closed after this date will be returned in the report (format is yyyy-mm-dd)  **Parameter 2:** (End Date) (optional): Only issues closed prior to this date will be returned in the report (format is yyyy-mm-ddThh:mm:ss) |
| Count of Active and Inactive Issues | Report to provide a count of Active and Inactive issues for the time frame specified. | **Parameter 1:** (First Available Date) (optional): Only issues submitted after this date will be returned in the report (format is yyyy-mm-dd) **Parameter 2:** (End Date) (optional): Only issues submitted prior to this date will be returned in the report (format is yyyy-mm-dd) |
| Count of Issues Resolved Outside Benchmark | Returns a count of issues closed outside of the specified benchmark number of days for a particular time frame. | **Parameter 1**: (Benchmark Days) (required): Target number of days after submission for an issue to be resolved **Parameter 2:** (First Available Date) (optional): Only issues closed after this date will be returned in the report (format is yyyy-mm-dd) **Parameter 3**: (End Date) (optional): Only issues closed prior to this date will be returned in the report (format is yyyy-mm-dd) |
| Count of Issues Resolved Within Benchmark | Returns a count of issues resolved within the specified benchmark number of days for a particular time frame. | **Parameter 1:** (Benchmark Days) (required): Target number of days after submission for an issue to be resolved **Parameter 2:** (First Available Date) (optional): Only issues closed after this date will be returned in the report (format is yyyy-mm-dd) **Parameter 3:** (End Date) (optional): Only issues closed prior to this date will be returned in the report (format is yyyy-mm-dd) |
| Count of Issues in State | Report to provide the total number of issues in each state for the selected subtype(s) for the time frame specified. | **Parameter 1:** (First Available Date) (optional): Only issues submitted after this date will be returned in the report (format is yyyy-mm-dd) **Parameter 2:** (End Date) (optional): Only issues submitted prior to this date will be returned in the report (format is yyyy-mm-ddThh:mm:ss) |
| Count of Issues by Sub-Type by Submit MP DUNS | Report to provide the count of issues by sub-type for a given submitting MP DUNS for the sub-type(s) selected. | **Parameter 1:** (First Available Date) (optional): Only issues submitted after this date will be returned in the report (format is yyyy-mm-dd) **Parameter 2:** (End Date) (optional): Only issues submitted prior to this date will be returned in the report (format is yyyy-mm-dd) |
| Count of Issues by Submitting MP DUNS | Report to provide the total number of issues identifying the submitting MP type of CR or TDSP | **Parameter 1:** (First Available Date) (optional): Only issues submitted after this date will be returned in the report (format is yyyy-mm-dd) **Parameter 2:** (End Date) (optional): Only issues submitted prior to this date will be returned in the report (format is yyyy-mm-dd)**Parameter 3:** (Submitting Company DUNS): (optional) |
| Count of Issues by Sub-Type | Report to provide the total number of issues submitted for the selected sub-type(s) | **Parameter 1:** (Issue Available Date) (optional): Only issues submitted after this date will be returned in the report (format is yyyy-mm-dd)  **Parameter 2:** (End Date) (optional): Only issues submitted prior to this date will be returned in the report (format is yyyy-mm-dd) |
| Details for Issues Resolved Outside of Benchmark | Returns details for issues closed outside of the selected benchmark number of days within the time frame specified. | **Parameter 1:** (Benchmark Days) (required): Target number of days after submission for an issue to be resolved **Parameter 2:** (First Available Date) (optional): Only issues closed after this date will be returned in the report (format is yyyy-mm-dd) **Parameter 3:** (End Date) (optional): Only issues closed prior to this date will be returned in the report (format is yyyy-mm-dd)  **Parameter 4:** *(Include Comments)(optional): Populate this field to receive issue comments in the report (format is Y or y to include comments)*  **Parameter 5***: (Comment First Available Date) (optional): Only comments after this date will be returned in the report (format is yyy-mm-dd)*  **Parameter 6***: (Comment End Date) (optional): Only comments prior to this date will be returned in the report (format is yyy-mm-dd)* |
| Issue Details by ESIID | Issue Details for a select group of ESIIDs for the subtype(s) selected. | **Parameter 1:** *(Include Comments)(optional): Populate this field to receive issue comments in the report (format is Y or y to include comments)*  ***Parameter 2:*** *(Comment First Available Date) (optional): Only comments after this date will be returned in the report (format is yyy-mm-dd)*  **Parameter 3:** *(Comment End Date) (optional): Only comments prior to this date will be returned in the report (format is yyy-mm-dd)*  **Parameter 9:** (ESIIDs) (required): List of ESIIDs to retrieve issue details for.  Input values should be comma separated format (‘esiid1’,’esiid2’,’esiid3’,...) and entire list must not exceed 4,000 characters |
| Issue Details by Issue ID | Issue Details for a select group of Issue IDs for the subtype(s) selected. | **Parameter 1:** *(Include Comments)(optional): Populate this field to receive issue comments in the report (format is Y or y to include comments)*  ***Parameter 2:*** *(Comment First Available Date) (optional): Only comments after this date will be returned in the report (format is yyy-mm-dd)*  **Parameter 3:** *(Comment End Date) (optional): Only comments prior to this date will be returned in the report (format is yyy-mm-dd)*  **Parameter 9:** (Issue IDs) (required): List of Issue IDs to retrieve issue details for.  Input values should be comma separated (format is issueID1,issueID2,...) and entire list must not exceed 4,000 characters |
|  |  |  |
| Time in State | Report to provide the days an issue spent in each distinct state both the first time it moves into the state as well as the last time if applicable. | **Parameter 1:** (First Available Date) (required): Only issues touched after this date will be returned in the report (format is yyyy-mm-dd) **Parameter 2:** (End Date) (optional): Only issues touched prior to this date will be returned in the report.  Date must be no more than three months after Parameter 1 - First Available Date (format is yyyy-mm-dd) |
| Total No. Closed | Report to provide a count by subtype of all issues closed within the specified time frame. | **Parameter 1:** (First Available Date) (optional): Only issues that have been closed after this date will be returned in the report (format is yyyy-mm-dd) **Parameter 2:** (End Date) (optional): Only issues that have been closed prior to this date will be returned in the report (format is yyyy-mm-dd) |
| Issues Open Outside Benchmark | Report to Provide the active issues that have been open outside of the selected benchmark number of days. | **Parameter 1:** (Benchmark Days) (required): Target number of days after submission for an issue to be resolved |
| Issue Transition Details | Report to Provide by subtype the issue transition details. This report will also help with tracking the transition details for the Meter Tampering Switch Hold Issues. | **Parameter 1**: (First Available Date) (required): Only issues opened after this date will be returned in the report (format is yyyy-mm-dd)  **Parameter 2**: (End Date) (required): Only issues opened prior to this date will be returned in the report (format is yyyy-mm-dd)  **Parameter 3:** (ISA) (optional): Including “7164” will bring back all Meter Tampering Switch Hold issues  **Parameter 4:** *(Include Comments)(optional): Populate this field to receive issue comments in the report (format is Y or y to include comments)* |

## Submitting a Background Report

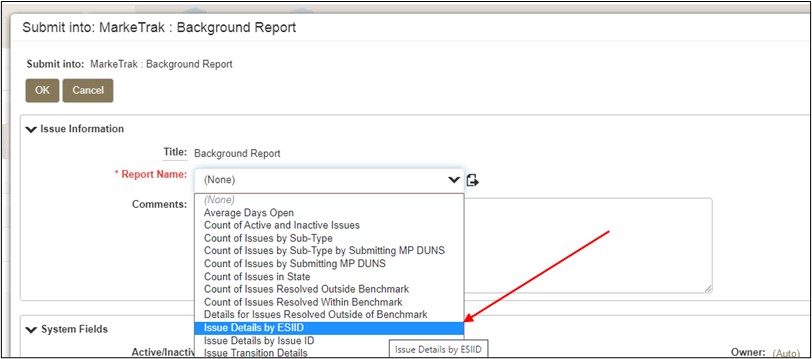
1. **Example: User Submits Background Report – Issue Details by ESIID**
2. User will click the “+NEW” icon from the toolbar and select **‘Background Report’.** (**Fig 9.1.3.1a**)

**Fig 9.1.3.1a**

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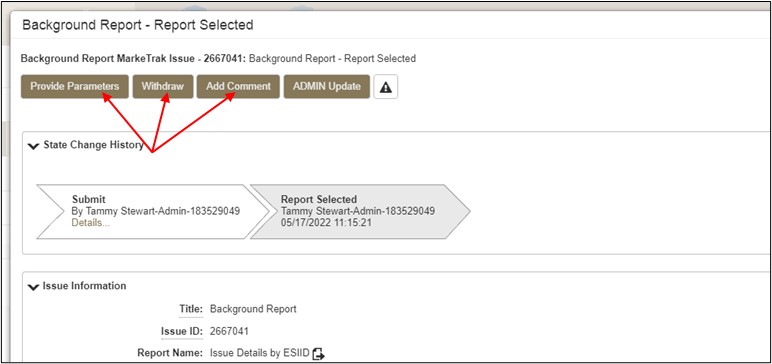
1. User will select the Report Name to be generated from the drop down list. For this example, the user will select Issue Details by ESIID. (**Fig 9.1.3.1b**)

**Fig 9.1.3.1b**

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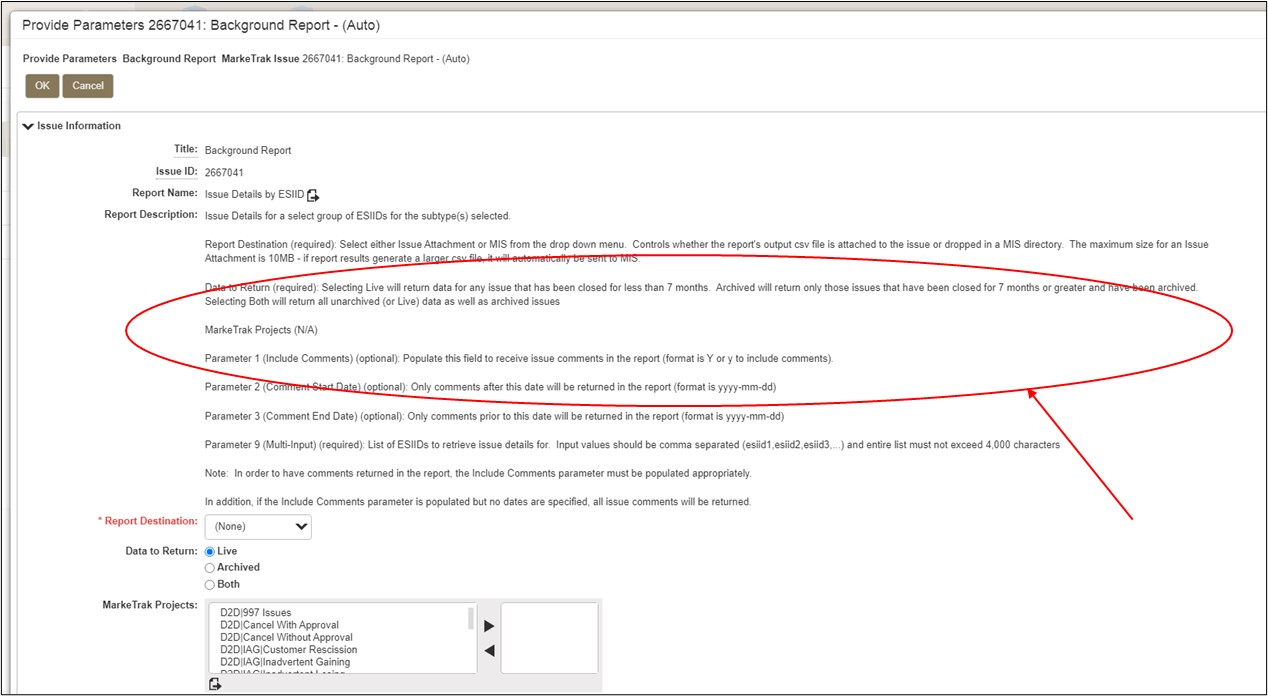
1. User selects **OK**. Comments are optional on this transition.
2. By selecting **OK**, the issue is created and the user has the option to **Provide Parameters**, **Withdraw** the report, or **Add Comment**. (**Fig 9.1.3.1c**)

**Fig 9.1.3.1c**

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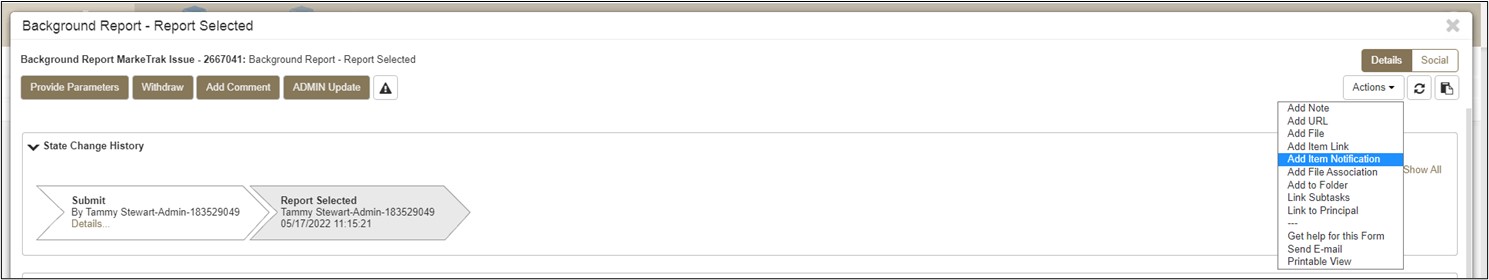
1. By selecting **Provide Parameters**, the user will be prompted to enter the required information for the selected report.
2. All required parameters for the report type selected will be shown above the Report Destination drop-down field. (**Fig 9.1.3.1d**)

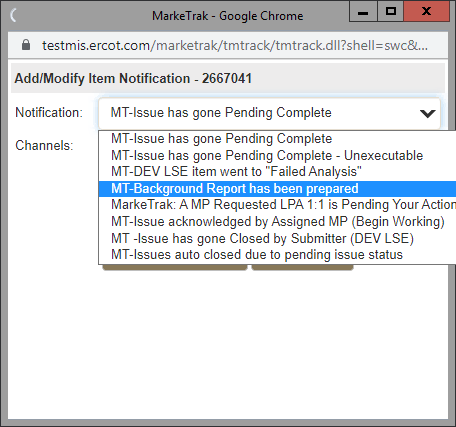
**Fig 9.1.3.1d**

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1. The user will select the Report Destination which is a required field. The user has the option to attach the report to the issue or to post the report to MIS. There is a file size limitation of 10MB. If the results generate a CSV file that exceeds 10MB, it will automatically be sent to MIS.
2. The user has the option to select a MarkeTrak Project (issue sub-type). All reports provide the option to select a project but it is not a required field for all reports. The user also has the ability to select multiple projects by holding down the Ctrl key while making their selection(s).
3. The user inputs the parameters required for the type of Background Report that is being requested. Different reports have different parameters. Any parameters that are not available will either not be visible or will display the ‘Not Used’ label.
4. For Multi-Input parameters (such as ESIID and/or Issue ID), the data must be comma separated (esiid1, esiid2, esiid3,…) and the list cannot exceed 4,000 characters.
5. Once all parameters have been entered, the user selects **OK**.
6. The user now has the ability to review the data entered and, by selecting the buttons at the top of the screen, can **Submit Report**, **Update Parameters**, **Withdraw** the issue, or **Add Comment**.
7. Once submitted, the report will run in the background and the issue will remain open until the report posts to either the issue or to MIS. The user can choose to be notified via email when the report has generated by clicking the ‘**Actions**’ drop-down menu, selecting the ‘**Add Item Notification**’ and ‘**MT – Background Report has been prepared**’. This must be done prior to clicking the **Submit Report** button. (**Fig 9.1.3.1e**)

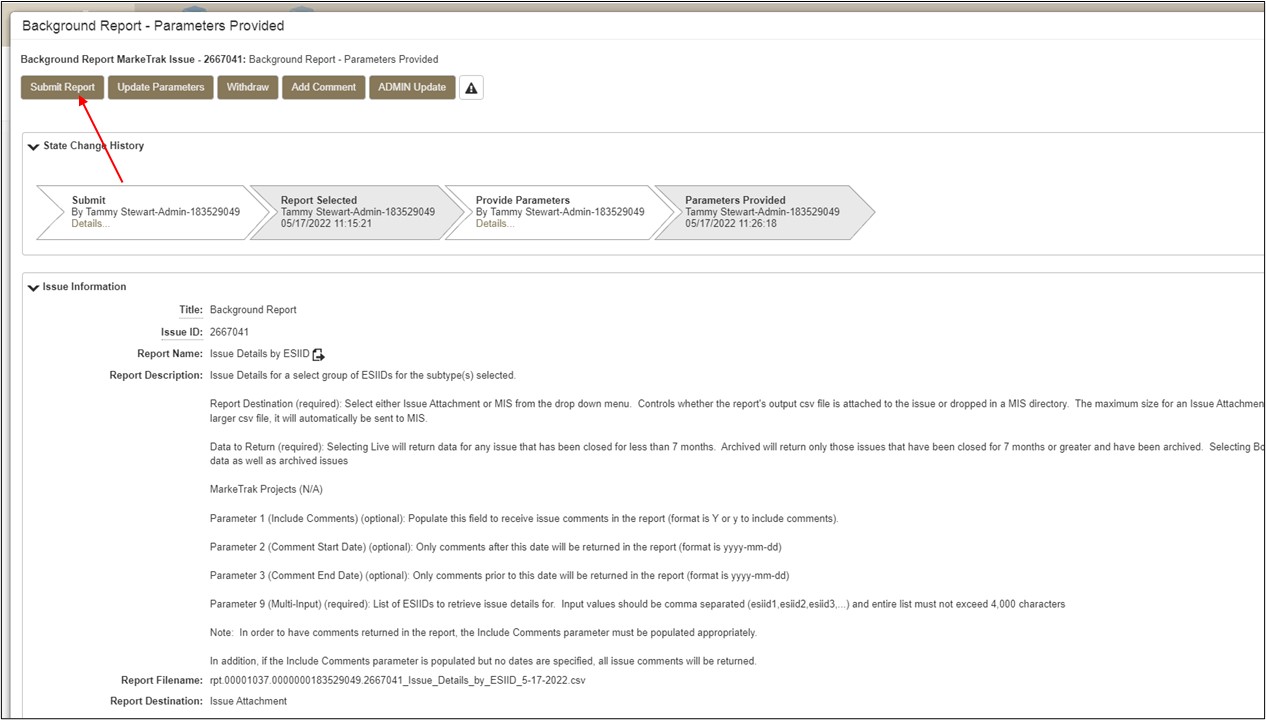
**Fig 9.1.3.1e**

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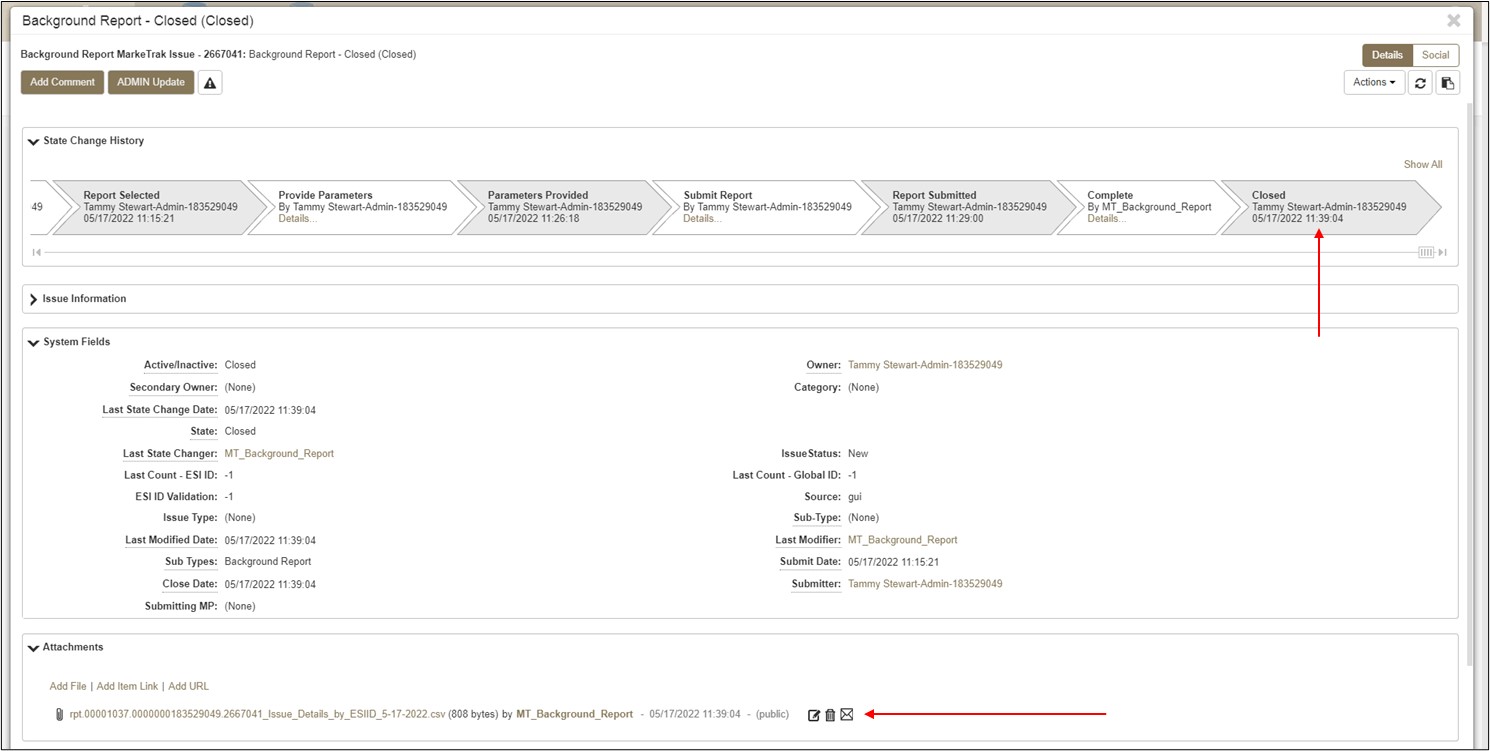
1. The user selects **Submit Report** and the report request is initiated in the background. The report will post to the issue or to MIS upon completion depending upon the Report Destination chosen by the user and/or the size of the results file. (**Fig 9.1.3.1f**)

**Fig 9.1.3.1f**

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1. Once the report has completed and posted to the designated location, a notification email will be generated (if applicable) and the issue will **Auto-Close**. (**Fig 9.1.3.1g**)

**Fig 9.1.3.1g**

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