

Quest® Stat® 6.0.0
Web User Guide



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Legend

 **CAUTION:** A CAUTION icon indicates potential damage to hardware or loss of data if instructions are not followed.

 **IMPORTANT NOTE, NOTE, TIP, MOBILE, or VIDEO:** An information icon indicates supporting information.

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Stat Web

The Stat® Web client provides online access to the CSR Console main window. The left side of the window features controls that let you search for CSRs, create new CSRs, and set up queries that display the types of information you want. When you first login, the main portion of the window displays two default queries, My CSRs, which lists all the CSRs assigned to you, and My Late CSRs, which shows all your CSRs that are currently past due.

Topics:

- [Opening Stat Web](#)
- [Exiting Stat Web](#)
- [Changing your password](#)

Opening Stat Web

User access to Stat® is controlled by standard logon security and user class rights. To connect to Stat Web, you must have the user class right to access the Stat Web client (which by default is granted to all user classes but can be removed by system administrators). After you enter both a valid user ID and password, Stat authenticates your logon information and grants you access.

i | **NOTE:** Access to the Stat Windows client is similarly controlled by logon security and a separate user class right.

Each user defined within Stat is assigned a unique user ID and password. The user ID, which is between 1 and 10 characters, identifies you in the system. The password must be between 6 and 10 characters in length. Your system administrator creates all user IDs and passwords, although you can change your password after you have logged in.

To open Stat Web:

- 1 Open your internet browser and go to the URL address for Stat Web, as configured by your system administrator.

i | **NOTE:** The URL address for Stat Web is displayed on the About box of the Stat Windows client. In the Stat Windows client, select **Help | About Stat....** to open the About box.

- 2 Enter your user name in the **User Name** field.
- 3 Enter your password in the **Password** field.

i | **NOTE:** If your password has expired, you are prompted to create a new one. Also, if your password has been reset, you will receive a temporary password by email. After logging in with the temporary password, you can change your password in Stat Web. See [Changing your password](#) on page 6 for more information.

- 4 Click **Log in** or press <Enter>.

i | **CAUTION:** Connecting as two different users from the same browser (e.g., in separate windows) will cause the second browser window to cancel the first browser's login session. Similarly, if you use a single browser to connect to two different installations of Stat Web, the second login will cancel the first browser's session.

Exiting Stat Web

To exit Stat® Web, go to the user account drop-down menu in the top right portion of the window and select **Sign Out**. This returns you to the Stat Login window.

Changing your password

You can change your Stat® user password in Stat Web. This also changes your password for the Stat Windows client.

To change your password:

- 1 In the CSR Console main window, open your user drop-down menu and select **Change Password**.
- 2 Enter your old password. Then enter a new password that conforms to password requirements as configured by your system administrator.
- 3 Re-enter your new password to confirm. Then click **Change**.

Queries

The CSR Console is designed to display three kinds of queries, based on the items they are designed to find in the Stat[®] Repository: CSRs, tasks, and approvals (as applied to both migrations and status transfers). Query results are displayed in a list format, but because queries can be excessively long or contain information you do not need, you can sort and filter queries and then save the results, either under the same name or as a new query. Also, if you have the proper security right, you can save a query as a global, meaning it will be available to all users when they log into Stat Web. After you create and save a new query, you can then add it to the CSR Console where it will remain as part of your customized display setting.

Topics:

- [Creating and deleting queries](#)
- [Filtering queries](#)
- [Sorting queries](#)
- [Exporting queries](#)
- [Using pages](#)

Creating and deleting queries

For each kind of query, the CSR Console provides two pre-defined queries. The first query, the Default Query, displays a complete, non-filtered list of all the CSRs, tasks, or approvals in the Stat[®] Repository. The second query displays only those CSRs, tasks, or approvals that are assigned to you as the user currently logged in. These queries are named My CSRs, My Tasks, and My Approvals, respectively, and are displayed by default when you first open the CSR Console. You can use any existing query as the template for any new query you want to create.

If you have the right to create global queries, you can also edit and delete them.

To create a query:

- 1 If it is not currently displayed, go to the **Add Query** menu and add the query that you want to use as the template for the new query to the CSR Console.
In the **Add Query** submenus, global queries are separated from personal queries which are only available to you as the current user.
- 2 Click the **Query Settings** button on the query tool bar located in the top right corner of the query.
This opens the **Query Settings** window for that query.
- 3 Filter and sort the query as needed.
For more information, see [Filtering queries](#) on page 8 and [Sorting queries](#) on page 9.
- 4 When finished, click the **Save As** tab.
- 5 In the **Query Name** field, enter a new name for the query.
- 6 Optionally, select the number of items you want displayed in the query list at a time. The default is 15.
- 7 Optionally, if you have the security right to create global queries and want to make the query available to all users, select the global check box.

If you do not have the security right, this check box is not displayed and the query will be saved as a personal query.

- 8 Click **Save**.

Stat adds the new query to the appropriate **Add Query** submenu and displays it in the CSR Console.

To edit or delete a query:

- 1 Open the **Query Settings** window for the global query you want to delete
- 2 Click the Save As tab and then edit the query and click **Save**, or to delete the query, click **Delete**.

Deleting a query removes it from the list of available queries in the CSR Console for all users.

Filtering queries

Query results are displayed in a tabular format. Filtering a query entails specifying which columns you want visible and in what order and then specifying the range of values you want a particular column to display.

To filter a query:

- 1 Click **Query Settings** on the tool bar located in the top right corner of the query.

This opens the **Query Settings** window for that query.

- 2 Select the **Columns** tab.

The left side of the window shows all the available columns that can be displayed in the query. The right side shows the columns that are currently visible in the query. From here you can add more columns to the query, remove any you do not want visible, and change the order in which the visible columns are displayed.

- 3 In the **Available Columns** field, click each column you want displayed in the query. Hold down the <Ctrl> or <Shift> keys to make multiple selections. Then click **Show** to add these columns to the list of visible columns.
- 4 Optionally, if you want to remove any columns from the query, select them in the list of visible columns and click **Hide**.
- 5 To change the order in which columns are displayed in the query, select the column you want displayed first and click **Move Up** until it is at the top of the list, and so on for the remaining columns until they are in the order you want.
- 6 Click the **Filters** tab.

Filtering a column involves specifying the type or range of values you want that column to display. Depending on the column, the values you specify can be either user-defined or selected from a pre-defined list.

The **Available Columns** field shows all the columns that can be displayed in the query. When you select a column, the **Operands** field shows all the functions that can be applied to the range of possible values for that particular column. For example, if in a CSR query you select the **Assigned User** column, the **Operands** field includes only the functions **equals** and **does not equal**, because there are a finite number of users defined in the Stat Repository and a CSR can be assigned to only one user at time. Similarly, if you select the column, **#of Objects**, the list of Operators includes numeric functions, such **equals**, **greater than**, **less than**, and so on. After specifying the numeric function, you need to enter a number in the **Value(s)** field.

Stat Web supports advanced filtering based on AND/OR logic:

- You can apply as many filters to a query as you want. In this case, the multiple filters work in conjunction based on AND logic. For example, you define two filters, one that says the value in the **CSR Type** column must equal **In Development**, and another filter that says the **# of Objects** must be greater than 10. When searching the Stat Repository, the query returns only CSRs that are type **In Development** and are associated with more than 10 objects.

- You can define an extended filter based on OR logic. This is done by selecting multiple values, either by holding down <Ctrl> or <Shift> keys or, in the case of numeric values, by specifying a number, clicking the + button next to the **Value(s)** field, and specifying an additional number. For example, you want a CSR query to return only CSRs that are associated with exactly 5 or 10 objects. To do this you would select the column **# of Objects**, the operator **equals**, and in the **Value(s)** field enter then number **5**. Then you would click the + button and in the next **Value** field enter the number 10.
- 7 Select the column you want to filter in the **Available Columns** field.
 - 8 Select the Operator function you want. Then, depending on the column and operator, specify or select a value in the **Value(s)** field. To define an extended filter, hold down <Ctrl> or <Shift> keys and select multiple values or, in the case of numeric values, specify a number, click the '+' button next to the **Value(s)** field, and specify an additional number.
 - i** **NOTE:** For date-specific columns, such as Created On and Due Date, the **Value(s)** field features a Calendar popup which you use to specify a date or range of dates. If you want to specify the current date and time, click the Now link. This adds the environment keyword `${now}` which is used as a comparison value against values in the database. For example, if you defined the following filter in a CSR query, [Created Date] between "Sep 15, 2004" and "\${now}", the query would return all CSRs created since September 15, 2004 and when the query is run or refreshed.
 - 9 After defining the filter, click **Add Filter**. The filter equation is displayed in the **Filter** field.
 - 10 Define any additional filters you want to apply to the query. Multiple filters are applied in an "AND/OR" format. If you want to remove a filter, select it in the **Filters** field and click **Remove Filter**.
 - i** **NOTE:** The Assigned User column features the environment keyword value `${UserId}`, which specifies the currently logged in user. This value is used by system administrators to define default queries available to all users, such as the My CSRs query.
 - 11 When finished, click the Done tab to save your changes and close the Query Settings window, or click **Sort** to specify the sort order for values displayed in particular columns.

Sorting queries

In the **Sort** window, you can specify whether you want values displayed in particular columns displayed in ascending or descending order.

To sort a query:

- 1 In the **Query Settings** window for the query you want to sort, click the **Sort Order** tab.
- 2 Select the column(s) you want to sort in the **Available Columns** field. Hold down the <Ctrl> or <Shift> keys to make multiple selections.
- 3 Click **Add**.
- 4 For each column you add, specify whether you want the values to be sorted in ascending or descending order.
- 5 If you are basing the sort order of a query on multiple columns, use the Up and Down arrow buttons to change the order in which the columns will be sorted, so that the first column you want the sort order to be based on appears at the top of the list, and so on.
- 6 To remove a column from the sort order, select its corresponding check box, and click **Remove**.
- 7 When finished, click the **Done** tab to save your work. The CSR Console displays the sorted query.

Exporting queries

You can export the contents of a query in a number of different file formats. This feature can facilitate printing when a query contains an especially large amount of data.

To export a query:

- 1 Click the **Export** button on the query's toolbar located in the top right corner of the query.
This opens the **Export Settings** window for that query.
- 2 Select the file format in which you want to export the query. Options include CVS, Excel, PDF, HTML, and Text.
- 3 Click **OK**.

Using pages

If you have several queries displayed in the CSR Console, it may be difficult to navigate through all the available information. One way to organize your queries is to display them on separate pages. This way, you could have one page for CSR queries, another page just for task queries, and a third page for approvals, or you can have pages which display queries only for specific users or service domains.

When you first log in, the CSR Console features one default page, My Stat.

To add a page, click the Add Page link in the CSR Console. Then in the **Add Page** field, enter the name you want for the new page and click **Add Page**. To remove a page, open it and click **Remove Current Page**. You can remove any page in the CSR Console, including the default, MyStat page.

- i** | **NOTE:** Removing a page does not delete the queries that are currently displayed on that page. The queries remain available in their respective submenus where you can add them to a different page as needed.

CSRs

CSR stands for Change/Service Request, which is basically a problem or issue reported by a customer or another user that is documented and resolved in Stat[®]. The CSR window is a central location in which to compile all the information related to a request, as well as manage all the steps of investigating and resolving it. CSRs are where most of the user activity in Stat takes place.

Topics:

- [Finding CSRs](#)
- [Viewing CSRs](#)
- [Creating CSRs](#)
- [Adding attachments to CSRs](#)
- [Creating CSR templates](#)

Finding CSRs

If you need to open a CSR that is not currently listed in one of your CSR queries, Stat[®] provides two ways to quickly locate CSRs in the Stat Repository.

To find CSRs:

- If you know the CSR ID, enter it in the **Open CSR ID** field, and click the arrow button or the <Enter> key. When entering the ID, be sure to include the service domain code, for example, ORA-29.
- If you do not know the CSR ID, enter key words in the **Search** field, and click the arrow button. Stat Web searches the Stat Repository for all the CSRs that contain the keywords you specified in any of their text fields and lists the CSRs it finds in the **Search Results** page. To conduct a narrower search, enter more keywords or whole phrases enclosed in quotation marks. Keyword searches are case insensitive.

Viewing CSRs

Topics:

- [Opening a CSR](#)
- [Setting the current tab as the default](#)
- [Exporting](#)
- [Filtering CSR information](#)
- [Closing CSRs](#)

Opening a CSR

To open a CSR:

- Click the CSR listed in the CSR Console main window.

i **NOTE:** If you attempt to open a CSR that you have locked in the Stat® client application, Stat Web opens the CSR in read-only mode and gives you the option to override the lock and open the CSR in full edit mode. CSRs locked by other users open in read-only mode. Position your cursor over the CSR title bar to see what user has the lock and when it was locked.

When you open a CSR in Stat Web, the **CSR Information** tab can be accessed from the icon next to the current logged in username on the top right side of the banner, while more detailed information is displayed in the main body of the window. You can select the type of information you want displayed in the CSR Information window by selecting the Edit options in the **CSR Information** tab. You also can filter the information. You may also use the Export option on the CSR Information tab in order to export and print the whole content of the CSR, including the information in all sections. For more information on how to filter this information, see [Filtering CSR information](#) on page 15.

All available sections are displayed on the left hand side of the CSR window. The Details section has 3 tabs. The **Properties** tab shows general information about the CSR, such as type, application, assigned user, etc. The other two tabs are for showing the **Description** and **Resolution** fields. The remaining sections on the left hand side show more function-specific information, such as **Workflow** (if any), **Tasks**, **Attachments**, **Logs**, and change **History**.

The following table provide a brief description of each field in the **Properties** tab of the CSR window.

Table 1. CSR fields

Field	Description
Title (Required)	A brief explanation of the CSR.
Service Domain	The service domain in which the CSR is defined.
Application (Required)	An application defines what product or facet of your enterprise is represented in the CSR. Applications are defined by your system administrator. An example of an application might be PeopleSoft Ver. 8.
Environment (Dependent on Application)	Environments further define an application. However, not all applications need to have environments. Environments are defined by your system administrator. If your application is Financials, your environments might be, or AP, AR, and GL.
Project (Optional)	If a CSR is associated with a Stat project, the project field displays the project ID number. Double-clicking on the ID number opens the Project window for that project. If this field is blank, the CSR does not belong to a project. You can add CSRs to projects from either the CSR window or the Project window.

Table 1. CSR fields

Field	Description
Customer (Required)	<p>The customer is the person who makes a request or reports a issue. Stat-initiated communication (such as emails) regarding this CSR are addressed to this person. The customer is the main contact for the CSR.</p> <p>Customers are defined by system administrators in the Stat Windows® client. However, if the customer you want to associate with the CSR is not currently defined in the Stat Repository, with proper security rights you can add the customer when creating the CSR in Stat Web.</p> <p>To add a customer:</p> <ol style="list-style-type: none"> 1 Click Add. 2 Specify the required customer properties (first and last name, department, and country) and any optional properties. 3 Click Add.
Type (Required)	<p>CSR types divide CSRs into categories to help identify the kind of problem or request the CSR represents. The types are defined by your system administrator. Examples of CSR types might be Fix, Enhancement, and Standard Change.</p>
Workflow (Dependent on CSR Type)	<p>Workflows are sets of rules that regulate the sequence and conditions by which CSRs can change from one status to another. Your system administrator defines workflows based on a combination of service domain and CSR type. When you select a CSR type, this field automatically displays the default workflow defined for that type. You can select a different workflow if more than one has been defined. However, if no workflows have been defined for the selected CSR type, this field is grayed out.</p> <p>When you save a CSR in which a workflow has been assigned (as shown in the Workflow field), the function specific Workflow field appears.</p>
Status (Required)	<p>Displays the current status of the CSR. CSR statuses are associated with CSR types. The status represents the states or conditions that a CSR of a particular type can go through during its development lifecycle. Your system administrator can define several CSR statuses. However, all CSR statuses are variations of three major types:</p> <ul style="list-style-type: none"> • Open – This indicates that the CSR has not been completed and is still being addressed. You will probably have several variations of open, such as Pending Approval, In Progress, and in Testing. • Closed – This indicates that a CSR has been completed. CSRs of a closed status no longer appear on the Support Console list of CSRs. There could be various closed statuses, such as Completed and Cancelled. • Closed for Statistics – If a CSR is still open but should not be counted in departmental statistics as such, you can give it a Closed for Statistics status. This special status lets you filter information on reports. For example, if you are waiting on a fix from a vendor, you no longer have control of the issue. You may decide to place the CSR in a holding state.

Table 1. CSR fields

Field	Description
Queue (Required)	A specific group of Stat users with similar skill sets or responsibilities available to work on a particular CSR. A user who is not a member of the assigned queue cannot be assigned to the CSR. Your system administrator defines queues and their members. Queues might include Development, Training Staff, Management, and Support Services.
Assigned To (Required)	The user ID of the owner of the CSR. Throughout Stat, this user is called the assigned user. The list of available users depends on the group selected. The assigned user may change several times through out the life of a CSR.
Open By (Auto)	When a user opens a new CSR, Stat automatically populates this field with the user's name. If this CSR was opened via email the default name is "Account, System." If you have proper security, you can change the value displayed in this field.
Open Date (Auto)	When a new CSR is opened, Stat automatically populates this field with the current date and time.
Priority (Required)	Priorities indicate the urgency of the request as determined by the user (as opposed to the customer, which is documented in the Customer Priority field). When your system administrator defines priorities, a turn around time is associated with the priority. The turnaround time determines the due date of the CSR. A priority of Urgent might have a turnaround time of 24 hours, which sets the due date to 24 hours after the open date. However, since some organizations may define turn around time in business days only, 24 hours can mean the following Monday if the CSR was opened on a Friday.
Due (Auto)	When you make a selection in the Priority field, Stat automatically populates this field with the appropriate date and time.
Closed Date (Auto)	When a CSR is changed to a status equaling closed, Stat automatically updates this field with the current date and time. Before a CSR is set to a closed status, this field is disabled and displays the default value, "01Jan1900 00:00."
Customer Priority (Optional)	The value displayed in this field indicates what priority the customer believes his or her request should have. Although the value may actually be different than what you decide the priority should be (as indicated in the Priority field), this is a way to record the customer's sense of urgency in resolving the issue. Customer priority values are service domain-specific and are defined by your system administrator.
Tracking # (Optional)	If the customer has a tracking number for the issue documented in the CSR or if the request initially came from an external help desk system, you can record it in this free form text field.
Alt. Phone (Optional)	Enter an alternate telephone number for the customer, if necessary. This information is stored with the current CSR only.

Setting the current tab as the default

On the **Details** section of the CSR, any of the three tabs could be set as the default tab. This ensures that the selected tab will be displayed first when user opens the CSR. To set a tab as your default tab, make sure you are on the desired tab and click the **Set Current Tab as Default** link on the upper right side of the CSR window.

Exporting

On the **Details** section of the CSR, the content of the three tabs could be exported at any time by clicking the **Export** link on the upper right side of the CSR window.

Filtering CSR information

By default, Stat® Web shows all the general properties of a CSR in the **CSR Information** tab. However, you can filter the tab so that only the information you want is displayed and in the order you want. The filter settings you specify for the **CSR Information** tab are applied to the other CSRs you are allowed to open.

To filter the CSR Information tab:

- 1 Click the **Edit** link in the top right corner of the **CSR Information** tab.
- 2 Select the CSR properties (identified as columns) you want displayed.
 - To hide a property, select the column, and click **Hide**.
 - To display a hidden property, select it in the **Available Columns** field, and click **Show**. Use the <Shift> and <Ctrl> keys to make multiple selections.
- 3 To change the order that properties are displayed, select the property, and use the **Move Up** and **Move Down** buttons accordingly.
- 4 Click **Save**.

Closing CSRs

To close an open CSR:

- Click the **Exit CSR** button in the CSR window.

! **CAUTION:** For users running Stat® Web in a web browser, do not use the browser close button (the X button) to exit an open CSR. This closes Stat Web entirely and can result in a lock being placed on the CSR. To release a CSR Lock, click the Close button.

Creating CSRs

You can create a new CSR in either a blank CSR window, or you can use a CSR template if you created one previously in the current service domain. CSR templates are personalized default settings that save time by populating certain fields in a CSR window with pre-defined values. For more information, see [Creating CSR templates](#) on page 17.

To create a CSR:

- 1 Do one of the following:
 - If you want to create a new CSR in a blank CSR window, in the **Create CSR** drop-down menu select the service domain in which you want to create the CSR.
 - If you want to create a new CSR using a previously created CSR template, in the **Create CSR** drop-down menu select the service domain in which you created the template and check the **Use Template** check box.

Stat® opens a New CSR window, where you specify values for the CSR. The first tab on the **Details** section is the **Properties** tab.

When creating a CSR, you must enter or select a value in all the required fields (indicated by a red asterisk). Other fields display information that is either optional or populated automatically by Stat. You cannot save a CSR until all the required fields have been populated. For a description of each field in the New CSR window, see [CSR fields](#) on page 12.

- 2 Select or enter a value in all the required fields and any of the optional fields, as necessary.

There are two other tabs in the **Details** section for entering **Description** and **Resolution**:

- Before you can save a CSR, you must supply a textual explanation of the CSR in the **Description** field. Using free form text, you can describe a request in as much detail as you want. For example, suppose you open a CSR in response to a customer's request that a particular PeopleSoft panel be changed so that it properly allow for saves. You might enter the following information in the **Description** field: "User states that the panel only saves from 9 to 12 and then it does not save any longer."
- To change a CSR to a closed-type status, you must enter information in the **Resolution** field. The information entered here should be as complete and accurate as possible, as it will become part of your knowledge-based system. For example, a resolution may list the steps taken to solve a problem. Other users with similar problems may refer to this information to resolve recurring issues.

Because the information contained in the **Description** and **Resolution** fields are critical to the success of a CSR, you can use the advanced editing toolbar to enhance the quality of that information. Advanced editing tools includes text formatting, copying and pasting text from other applications, spell checking, and inserting images and hyperlinks. For more information, see the section, [Using advanced editing tools](#) on page 16.

i **NOTE:** Templates for the CSR **Description** and **Resolution** fields created in the Stat Windows client based on Application and CSR type are supported in Stat Web. However, if you change either the Application or CSR type in a CSR, a new template is loaded and Stat Web appends that template to the existing text in the **Description** and **Resolution** fields. It does not replace the text, as is the case in the Stat Windows client.

- 3 In the **Description** field, enter a textual explanation of the CSR. Use the advanced editing toolbar as needed.
- 4 (Optional) Click **Attachment** if you want to add an attachment to the CSR before saving it.

After saving the CSR, you may not be able to add an attachment if the CSR is assigned to a different user, or if you do not have the rights to edit CSRs. For more information, see [Adding attachments to CSRs](#) on page 17.

- 5 Click **Save**.

Using advanced editing tools

Because the information contained in the **Description** and **Resolution** fields is so critical to the success of a CSR, you can use advanced editing to enhance the quality of that information. Advanced editing includes text formatting, copying and pasting text from other applications, and inserting hyperlinks and image URLs.

Text Formatting

You can change the appearance of selected text by using the **Formatting** toolbar and the special function tool buttons located above the text field on the **Description** or **Resolution** field.

Using the Formatting tool bar, you can change the font, size, and alignment of selected text. You can also bold, italicize, or underline text.

Copying and Pasting

You can copy and paste text into the **Description** and **Resolution** fields from other applications. However, be aware that pasted text that is large in size or specially formatted (such as tables or text with graphics) may not display properly or may pose memory problems. If you want to add a large amount or specially formatted text to a CSR, consider either inserting a hyperlink or adding an attachment.

Adding attachments to CSRs

Stat® Web supports attaching files to CSRs. This allows users to immediately access important data both inside and outside of the Stat Repository.

i **NOTE:** By default, the maximum size of files you can attach to CSRs is 50MB, but this limit can be changed by system administrators in the System Maintenance table. The default 50MB size of CSR attachments is the recommended maximum. Attachments larger than 50MB can adversely affect performance. If you attempt to attach a file that exceeds the maximum size limit, Stat displays an error message. For more information, see the book, *Stat System Administration*, Chapter 4, “General Maintenance Tables.”

To add an attachment:

- 1 Select **Attachments** section in the CSR window.
- 2 Click **Add Attachments** to open the dialog window.
- 3 Click **Browse**. Then locate the file you want to attach to the CSR and click **Open**.
- 4 In the **Comments** field, enter a brief description of the attachment.
- 5 Click **Add Attachment**.

Stat Web uploads the file, attaches it to the CSR, and displays it in the list of attached files. If you want to delete an attachment, select it and click **Delete**. To download an attachment, select the **Download** button.

Creating CSR templates

You can specify default CSR values by saving a CSR as a template. When you save a CSR as a template, the values displayed in certain fields of that CSR become the default settings for new CSRs created within the same service domain. This can save time if many of the CSRs you create within a service domain have the same values. For example, if you work primarily with the Benefits application while in the HR service domain, you could create a template with Benefits as the default value displayed in the **Application** field of new CSRs.

You can use a CSR template to set default values for the following fields in a CSR window:

- Application
- Environment
- CSR type
- CSR status
- CSR priority
- Workflow
- Queue
- Assigned User

CSR templates are based on existing CSRs. If you want to base the template on a new CSR, first create the CSR by specifying the default values you want to use in the appropriate fields of the CSR window and click **Submit**. The new CSR can then be used as the basis for a template.

To create a CSR template:

- 1 Add a new CSR that you want to use as the template.
- 2 Check the **Update CSR Template** check box.
- 3 Save the CSR.

If a template already exists for the current service domain, saving a CSR as a template overwrites the existing template.

Workflows

Workflows are sets of rules that regulate the sequence and conditions by which CSRs can change from one status to another. Your system administrator defines workflows based on a combination of service domain and CSR type. When creating a CSR, the **Workflow** field automatically displays the default workflow defined for the selected CSR type (if any). You can select a different workflow if more than one has been defined. However, if no workflows have been defined for the selected CSR type, this field is grayed out.

When you create a CSR that is assigned a workflow, the start status of the workflow is automatically the status of that CSR. The statuses to which you can transfer the CSR are determined both by the sequence of the workflow diagram and the completion of any transfer rules that may exist.

Topics:

- [Changing CSR status](#)
- [Understanding the Workflow section](#)
- [Viewing transfer rules](#)
- [Delaying approval requests](#)
- [Sending approval request notifications](#)
- [Updating approval lists](#)
- [Approving migrations and transfers](#)

Changing CSR status

When working on CSR assigned to a workflow, you cannot change the status of the CSR until any workflow rules governing that status transfer have been met.

To change the status of the CSR assigned to a workflow:

- 1 Click the **Workflow** section in the CSR window.

The **Workflow** window shows the current status of the CSR and the status(es) to which it can be transferred as specified in the workflow diagram. See [Understanding the Workflow section](#) on page 20.

For each status, the window also shows if the transfer rules defined for that status have been satisfied. A green check mark indicates that all the transfer rules have been met and the CSR can be transferred to that status. If any of the transfer rules defined for a status have not been satisfied, you cannot transfer the CSR to that status.

- 2 To transfer the status of a CSR, select the radio button next to the status and click **Transfer Status**. You can only transfer a CSR to statuses that display a green check mark, meaning that all their transfer rules are satisfied.

The **Transfer History** portion of the **Workflow** window shows the sequence of status changes the CSR has already gone through.

Understanding the Workflow section

The Workflow screen consists of three sections:

- **Status History section:** Displays at the top of the page. Shows recent and current status, and offers status transfer interactivity to advance to the next status.
- **Diagram section:** Shows a graphical representation of the workflow.
- **Detail section:** Displays below the workflow diagram. Shows details about an item selected in the diagram.

Status History section

The top portion of Workflow section shows a linear sequence of statuses, starting with past statuses, followed by the current status, followed by options for the next possible status.

Each past status shown is labeled with status name that represents the sequence of occurrence. Up to three past statuses are shown. If more than three past statuses exist, the sequence of statuses starts with an entry "(...)" before the three visible statuses. The current status is displayed next in bold.

A list of available transfers from the current status of the workflow is displayed next. The green check mark in the **Transfer Ready** column indicates if all rules for each status have been satisfied. If current user is able to transfer the status, the radio button next to the status in the **Change To** column will be enabled. Note that all rules could be satisfied for a status, but current user may not be in the **Changed-by Users** list. In this case, the radio button next to the status in the **Change To** column will not be enabled.

If a red stop icon is displayed in the **Transfer Ready** column, it indicates the presence of a condition blocking the transfer to that status.

Once an active status in the **Change To** target status list is selected, and when all possible additional conditions to transfer to the status have been met, the **Transfer Status** button become enabled, allowing the user to perform the status transfer.

When an active radio button in the **Change To** column is clicked, designating a target status, the following can result:

- If nothing else is required for the status transfer to take place, the **Transfer Status** button becomes active.
- If a status transfer rules is prompting a queue change, a set of interactive prompts appears, asking for a queue and user choice. The queue choice begins as active. Once a queue is chosen, the user choice activates. Once both choices have been made and nothing else is required for the status transfer to take place, the **Transfer Status** button becomes active.

A change of queue choice resets the user choice.

- If the target status choice implies a transfer override, an interactive prompt for an override explanation appears. Once text has been entered in the field, and nothing else is required for the status transfer to take place, the **Transfer Status** button becomes active.
- If the target status choice closes the CSR, an interactive prompt for CSR resolution information appears. Once text has been entered in the field, and nothing else is required for the status transfer to take place, the **Transfer Status** button becomes active.

Diagram section

The next section of the page shows the diagram of the workflow, with statuses as main nodes, arrows connecting the statuses indicating possible status changes, and transfer rule sets as nodes on the connecting arrows.

A status or a transfer rule set can be selected, by clicking it or by using the **Select Status** and **Select Transfer Rule Set** drop down lists above the diagram. Clicking in empty space in the diagram de-selects a selection. When an item in the diagram is selected, the detail section of the page, underneath the diagram, shows information about the item. A selected item is shown in a blue square as a selection marker.

The diagram differentiates, in order of precedence, between the current status, possible immediate next statuses (available or blocked), past (previously active) statuses, and future (non-visited) statuses that are not available as immediate transfer targets.

The diagram also indicates Start and End statuses, where the workflow originates / terminates.

The current status is a solid blue, with thick black and white outlines. Its status name is emphasized in bold.

- A possible immediate next status that is available (as opposed to blocked) is filled with a green and white vertical stripe pattern.
- A possible immediate next status that is blocked is filled with a diagonal red and white stripe pattern.
- A past (previously active) status is filled with a horizontal blue and white pattern.
- A future (non-visited) status is indicated with a white fill.
- A workflow start node is marked with an S badge.
- A workflow end node is marked with an E badge.
- A node that has been selected as a transfer target in the **Change To** column in the page is emphasized with a thick blue outline.

User-Advance vs. Auto-Advance Status Transfers

A connecting line between two status nodes shows arrowheads in the direction of possible status transfers: one way or both ways. A user-driven status transfer (requiring the user to interact with the Status History section, clicking the **Transfer Status** button to initiate the transfer) is represented by a solid black arrowhead. An auto-advance status transfer, which executes as soon as originating status is active and no blocking conditions exist, is represented by an outline arrowhead, with a white fill.

Transfer Rule Set Nodes in the Diagram

Transfer rule sets, if present, are shown as icons on the connecting lines between status nodes, near the tip of the connector in direction of the transfer. A transfer rule set that contains no blocked transfer rules is shown as a green check mark icon. A transfer rule set containing blocked transfer rules is shown as a red stop icon. If there are no transfer rules, a white non-filled circle is shown. Transfer rules outside of immediate reachable status transfers are shown with a grey-filled circle.

Other Actions

The Diagram section has its own set of secondary actions:

- Legend: shows a dialog window with a legend explaining the states of the diagram.
- Export: exports the entire workflow in pdf format.

Detail section

When no selection is made in the diagram, the detail section underneath the diagram is empty. With a status node selected in the diagram, the detail section shows details about the corresponding workflow status. With a transfer rule set selected in the diagram, the detail section shows details about the corresponding transfer rule set.

Status Details

For a selected status, the detail section shows a table of status rules for that status. The table will display the **Rule Name** and the **Rule Type** for that status.

Transfer Rule Details

For a selected transfer rule, the detail section shows a title that includes the originating status and the destination status between which the transfer rule resides. If the transfer is an automatic transfer, the title shows the modifier (Auto Transfer).

- If there are transfer approvals associated with the transfer rule, a **Transfer Approval List** button is displayed to access the approval summary.
- If there are migration approvals associated with the transfer rule, a **Migration Approval List** button is displayed to access the approval summary.

A tab set with three tabs is displayed for viewing the details for any possible **Transfer Rules**, the **Transfer History**, and **Changed-by User**. The **Transfer History** tab displays a table of previously occurred transfers for the selected transfer rule. The **Changed-by User** tab displays the list of users that are permitted to perform this transfer.

Workflow Transfer Approval and Migration Approval lists

Workflow transfers and migrations may require approvals. The list of approvers can be accessed from the Detail section of workflow. A **Summary Approval Status** is displayed that shows the current status of approvals. An ellipsis icon means that the approval is pending, a green check mark means that the approvals are done, and a red circle icon mean that approvals were rejected.

A list of Approvers is displayed depending on whether delayed approvals option has been selected or not. User with proper rights may select a row from the list and use the **Approve** or **Reject** button in order to approve or reject a transfer. The **Clear** button clears the approval status for the selected line. The **Email** button sends reminder email to selected approvers. You may also select all users in a Queue or Class by clicking on the Queue/Class name. For delayed approvals, the **Generate** button is used to generate the list of approvers. If delayed approval option is not set, the **Regenerate** button could be used to regenerate the approval list.

The status of approval is displayed for each Queue/Class/User. An ellipsis icon means that the approval is pending, a green check mark means that the approvals are done, and a red circle icon mean that approval was rejected.

The Approvals list has the following columns:

Table 1. Approvals list columns

Column	Description
Operator	Shows a sideways tree graph connecting a root node to each approver item. The graph shows AND and OR nodes to depict the dependencies existing between approver items. Each node in the graph shows a status icon: <ul style="list-style-type: none"> • Pending: ellipsis • Approved: green check mark • Rejected: red circle with a cross
Approver	Shows the Class/Queue name followed by the list of users or the Individual Approver followed by list of users. Approver line items and sub-line items are shown as active if they are selectable, and as inactive if not.
Approval Status	Shows icons for approval status per sub-line item. <ul style="list-style-type: none"> • Pending: ellipsis • Approved: green check mark • Rejected: red circle with a cross
Required	Indicates if the entry is required or not.
Overridden By	Lists the name of the overriding approver if an approval has been overridden.
Email Sent	Displays a green check mark for those listed users to which an email remainder has been sent.
Approval Date:	Shows the date the approval was made.

When an approval status is overridden by a user, a dialog pops up to capture the reason for the override, if the system parameter requiring to do so is set.

The **History** button displays the history of approvals for each transfer status.

Viewing transfer rules

To view the transfer rules for a particular status:

- 1 Click the **View Details** link to open the **Workflow: Transfer Rules** window.
All the workflow rules that control the status transfer of the CSR display. A green check mark in the **Complete** column indicates that the rule is complete. An alert icon indicates that the rule is incomplete.
- 2 Click the **Back to Workflow** link to return to the **Workflow** window.

Delaying approval requests

System administrators can configure workflow rules so that requests to approve a status transfer are not generated until all the other rules defined for the status transfer (if any) have been marked as complete. This ensures that a status is ready to be transferred before users are asked to approve it and reduces the number of approval requests open at any one time.

If the delayed approvals option has been selected, the Approval List for a particular status will be empty until all the other transfer rules are completed. Once status is ready to be transferred, a user can generate the approval requests by transferring the status, or with proper security rights, you can override the delayed approvals configuration and generate approval requests by clicking **Generate**. This button is only enabled for users that have been assigned the user class right, Status Transfer Approval Generate.

i | **NOTE:** Once the approval list has been generated, the **Generate** button changes to **Regenerate**.

Sending approval request notifications

With proper security rights, you can email a pre-formatted message to individual users or to all the users in the approval list reminding them about pending or rejected approval requests.

To email an individual user,

- click the mail icon for that user in the Approval E-Mail column in the approval list.

To email all users, click the **E-Mail** button.

An email job request is sent to the Stat[®] Central Agent which processes the request and sends an email either to each user you selected or to each user in the approval list. A green check mark is displayed next to each user you selected indicating that the job request was submitted to the Agent

System administrators can also configure the Stat Central Agent to include links in the reminder message that the recipient can click to approve or reject the status transfer. This sends an email back to the Stat Central Agent, which processes the response email and changes the approval status to **Approve** or **Reject**, depending on which link the approver selected.

i | **NOTE:** When an approval status is changed by responding to a reminder message, the **Update Date** field in the Approval List window will be automatically populated and the **Updated By** field will display the value, **Via email**.

For more information, see the book *Stat System Administration*, Chapter 7, Email Configuration.

Updating approval lists

Occasionally one of the classes or queues designated to approve status transfers needs to be updated, either because new users have been added to the class or queue or existing users have been removed. When this is the case, you can update the approved users list based on class or queue by clicking **Regenerate**. This removes obsolete users belonging to a class or queue from the list and adds new ones. It also resets approval statuses to Pending.

i | **NOTE:** Clicking the **Regenerate** button only affects users belonging to classes or queues and is enabled only for users that have been assigned the user class right, Status Transfer Approval Refresh.

Approving migrations and transfers

In Stat[®] Web, you can approve archive set migrations and CSR status transfers.

- If your system administrator has designated you as a migration approver for a particular environment, other users may need your approval before they can migrate archive sets into that environment. Migration approvals are database-specific and can be either required or optional.
- If you have been designated as a status transfer approver in a particular workflow by your system administrator, other users may need your approval before they can perform a status transfer. Status transfer approval lists can include individual users, entire user classes, or a combination of the two. Also, status transfer approvals can be either required or optional.

To approve a migration or transfer:

- 1 In the CSR Console main window, open an approvals query that displays any migration or status transfers that are awaiting your approval. as indicated by the value Pending in the Status column.

Your approval can be made either as an individual or as the member of a user class. Also, approvals are either required or optional:

- If required, Stat cannot perform the migration until you approve it. In the case of a required user class approval, every user within that class must approve the migration.
- If optional, then you are one out of a number of users who are authorized to approve the migration. Whenever an approval is marked as optional, the Min Approval column displays the minimum number of optional users who must approve the migration before the archive set can be moved into the target environment.

- 2 Click in the Status column for each migration or status transfer that you want to approve and select **Approve**. If you do not approve the transfer, select **Reject**.
- 3 Enter a brief explanation for why you approve or reject the migration or status transfer.
- 4 Click **Update**.

You can test the connections between Stat[®] Web and all the change management environments, file servers, and email servers defined in the Stat maintenance tables. You can also test the connection between Stat Web drop-down and any version control management system you have configured.

Tasks

Tasks detail all of the steps necessary to solve a problem or complete a request. For example, a CSR for the setup of a new employee may include numerous tasks, such as getting a confidentiality agreement signed, creating a user ID, and scheduling computer training. A CSR can contain an unlimited number of tasks that you can assign to many users. Tasks are associated with activity codes that group related tasks.

Stat® groups related tasks into activities, which are commonly-performed, high-level jobs that consist of several tasks. Activities are defined by a system administrator and are identified by activity codes.

Activities categorize your tasks for reporting purposes. An example of an activity might be Documentation, which consists of two tasks: Document Changes - Pre Change and Document Changes - Post Change.

Tasks are listed either in a query or in a CSR. When tasks are assigned to a user, they automatically appear in the Tasks list for that CSR.

Topics in this section:

- [Viewing task details](#)
- [Adding tasks automatically](#)
- [Adding tasks manually](#)
- [Posting time to tasks](#)

Viewing task details

- In the CSR window, click the **Tasks** link in the **View** tab of the CSR window.

The **Task Details** window displays the following information:

Table 1. Task fields

Field	Description
Activity Type	Each task must be associated with an activity code. An activity code is a category of tasks.
Title	A brief description of the task.
Assigned To	The user assigned to the task.
Start Date	The date when the task is scheduled to start.
Due Date	The date when the task is due to be completed.
% Complete	The percentage of the estimated time required to complete the task that has been worked.
Completed Date	The date that the task was completed.
Estimated Hrs	The estimated number of hours required to complete this task.
Actual Hrs	The total number of hours posted to this task thus far.
Bill Rate	The rate that will be charged for the task, if applicable. Task rates may default from the project to which a CSR is assigned.
Billed Hours	The number of billable hours that have been accumulated.
Comments	A free text field in which users can add comments regarding the task.

Adding tasks automatically

As you create a new CSR or change the information on a CSR, Stat® evaluates your entry and adds new tasks as needed. This type of task is called an auto task. Stat auto task capabilities let you quickly define advance workflows, including what takes place, when, and by whom. For example, as the status of your CSR changes from Approved to Move to Production, Stat can automatically create and assign various tasks to different users, such as **back up database** or **inform users PeopleSoft will be unavailable from 2 to 3**.

Auto tasks are activated by the **Application**, **CSR Type**, and **Status** fields of a CSR. If your CSR contains an application, type, or status that has an associated auto task, Stat automatically adds it to the Task window.

The user assigned to the task is determined by how your system administrator configured the task. It can be the user who opened the CSR, a pre-defined user, the user assigned to the CSR, the user currently logged on, or a user which you must select. Remember that each task in a CSR can be assigned to a different user.

Adding tasks manually

You can manually add tasks to a CSR at any time and assign them to other users in the service domain of the CSR.

To add a task manually to a CSR:

- 1 In the CSR window, click the **Tasks** link in the **View** tab of the CSR window.
- 2 In the **Tasks** list, click **New** to open the **Tasks** window.
- 3 Click in the **Activity Type** field and select an activity code from the list. Activity codes identify job categories that group related tasks. If the task does not fall into one of the pre-defined categories, select **Other Activity - Specify**.
- 4 (Optionally) In the **Title** field, enter a brief description of the task. By default, the title displays the selected activity type.
- 5 In the **Start Date** field, click the Calendar icon and select the date when the task is to be started. Most likely it will be the current date, but you can specify any date you want.
- 6 In the **Due Date** field, click the Calendar icon and select the date when the task should be complete. The due date of an auto task is determined by the system administrator. For example, the system administrator can specify that the task is due three days before the due date of the CSR. When you manually add a new task, the due date defaults to the CSR due date. You can also modify the due date if necessary.
- 7 Click in the **Assigned to** field and select the user you want to assign this task. The list includes all active users for the service domain.
- 8 In the **Estimated Hrs** field, enter the estimated number of hours it will take to complete the task. A value in this field is necessary for the system to determine the complete percentage.
- 9 In the **Bill Rate** field, enter the rate per hour that will be charged for the task, if any.
- 10 In the **Comments** field, type any comments regarding this task. Some tasks may require a comment when completed. Stat notifies you of this by displaying the word Required next to this field.
- 11 Stat automatically updates the **% Complete** field if you select the **Auto Update** option.
- 12 Click **OK** when you are finished, or add another task if you want by clicking the **New**.

Posting time to tasks

Stat® allows you to track the progress of a task by entering the exact time spent on it. Post the time in the **Task Entry** section of the **Tasks** window.

i | **NOTE:** Although you cannot post time to tasks opened directly from read-only CSRs, with proper security rights, you can post time to any task opened from a **Task Query** list, including tasks not assigned to you and tasks associated with closed or read-only CSRs.

To post time to a task:

- 1 Do one of the following to open the **Tasks** window:
 - From a CSR: Click the **Tasks** link in the **View** tab of the CSR window, and select the task.
 - From a Task Query: In a **Task Query** list, select the task.
- 2 Scroll down to the **Time Entries** section, which displays tasks already saved to the Stat Repository.
- 3 By default, the current date is displayed in the **Date** field. To change the date, click the Calendar icon next to the **Date** field, and select the date.
- 4 Click in the **User** field and select the user that performed the work.
- 5 In the **Hours** fields, enter the number of hours spent on the task. You can use decimals to post portions of an hour, for example, 4.35.
- 6 Optionally, enter a textual description of the work in the **Notes** field.
- 7 When finished, click **Update** to save the time entry.

Stat automatically updates the **Actual Hours** field with the total number of hours posted as time entries. Also, if the **Auto Update** option is selected, the **% Complete** field is automatically updated.

If you want to delete a time entry, click **Delete**.

CSR logs

- [Viewing CSR log files](#)

Viewing CSR log files

The **Log** window displays all the logs that have been added to the CSR, either by the user or automatically by Stat® when it sends or receives an email associated with the CSR, or when the CSR lock is overridden.

With proper security rights, you can modify the text and topic value of your own logs as well as logs written by other users after the logs are saved. However, you cannot delete logs once they are saved, and you cannot modify system-generated logs.

To view logs

- Click **Logs** section.
Logs created by Stat appear with the SYSTEM user ID and the log type is flagged as Stat Event.
- To view the contents of a log, double-click its corresponding record in the **Logs** window or click the **View** button.
- You may also filter the list of logs by selecting a category in the **Filter Logs** sub-section.

To add a log:

- 1 Click **New Log**.
- 2 In the **Topic** field, assigned a topic to the log topic.
Log topics are defined by system administrators and are used to organize logs.
- 3 Optionally, select the **Confidential** option.
Confidential logs are not emailed to customers. These logs can be viewed and printed only by Stat users with proper authority. In the **Logs** window, confidential logs are designated by a yellow warning icon.
- 4 In the **Details** field, enter the contents of the log.
- 5 Click **Create**.

CSR History

- [Viewing CSR change history](#)

Viewing CSR change history

As a CSR moves from one stage to another during its life cycle, many of its values are changed and updated. The **History** window maintains a record of these changes, allowing you to determine which values were changed, when, and by whom.

The **History** window records:

- Changes to the values in the general information fields of a CSR.
- Changes to the information displayed in the **Description** and **Resolution** fields. To view changes to the contents of the **Description** and **Resolution** fields, select the **History** row. Details of the changes will be displayed on the bottom of the window.
- The addition and deletion of attachments.
- Whenever objects associated with the CSR (if any) are added, locked, unlocked, reserved, or removed. To view detailed information, click a record labeled **Object Activity**. This information will be displayed on the bottom of the window. For each activity, the window displays the type of activity, the object name and type, the environment the object is located in, and the developer who initiated the action.

Job Monitor

In the **Job Monitor** page of Stat[®] Web, you can perform basic administrative tasks, such as manually running jobs and configuring the Stat Central Agent to skip scheduled jobs. Access to the Job Monitor page is controlled by user class rights.

Topics:

- [Opening the Job Monitor](#)
- [Viewing job schedules](#)
- [Running jobs](#)
- [Viewing logs](#)
- [Filtering and sorting jobs and logs](#)
- [Showing job and log details](#)

Opening the Job Monitor

To open the Job Monitor:

- 1 Click **Job Monitor** in the user account drop-down menu.

The Job Monitor has three tabs that display information about jobs.

Table 1. Job Monitor tabs

Tab	Description
Schedule	Shows all the jobs scheduled for the current 24 hour period that have yet to be processed. See Viewing job schedules .
Jobs	Displays a list of all the jobs that have been defined for the Stat Central Agent. See Running jobs .
Logs	Displays a list of error logs generated by Stat Central Agent for the current day.

Viewing job schedules

The **Schedule** tab shows all the jobs scheduled for the current 24 hour period that have yet to be processed. Because jobs can be scheduled to run at particular hour and minute intervals during the day, any jobs that already have been processed are not shown. Also, whenever you refresh the web page, jobs that were scheduled to be processed since the last time you refreshed are removed from view.

To view job schedules:

- 1 Click **Job Monitor** in the user account drop-down menu.
- 2 Open the **Schedule** tab.

The job schedule is defined in the Jobs Maintenance table located in the Stat Windows client, but from here you can configure the Stat Central Agent to skip selected jobs. If you do not want the Stat Central Agent to process any of the jobs that it is scheduled to perform, select the job(s) and click **Skip Selected**. An icon appears next to the job indicating that it will be skipped.

Running jobs

The **Jobs** tab displays a list of all the jobs that have been defined for the Stat[®] Central Agent. The Agent processes the jobs according to the schedule defined in the Jobs Maintenance table, but from here you can manually run the jobs you want.

To run selected jobs:

- 1 Click **Job Monitor** in the user account drop-down menu.
- 2 Open the **Jobs** tab.
- 3 Select the check box for each job that you want to run.
- 4 Click **Run Selected**. The Stat Central Agent processes the selected jobs and updates the Jobs tab with the latest information.

Viewing logs

Each time a serious or potentially serious error is encountered by the Stat[®] Central Agent, it logs the error to the database. The **Logs** tab provides you with a list of error logs generated by Stat Central Agent for the current day.

For each error log, the tab displays the date and time it was entered, as well as the service domain, ID number, class, description, and status of the job.

To view an error log:

- 1 Click **Job Monitor** in the user account drop-down menu.
- 2 Open the **Logs** tab.
- 3 Click on the job description to open a message box containing detailed information about the error.

Filtering and sorting jobs and logs

You can filter the information displayed in the **Job Monitor** window so that only the jobs or logs you want to view are displayed. Once you have specified filter settings, you can enable and disable the filter as needed.

You can also sort the information clicking column headings. By default, information is displayed in ascending order. When you click a column heading, the information is sorted in descending order based on the values displayed in that column. Clicking a column heading a second time sorts the information back in ascending order.

Filters can be based on service domain and job class. In the case of the **Schedule** tab, you can also base a filter on status and the date the jobs are scheduled to be processed.

To specify filter settings:

- 1 Click on the tab you want and then click **Show Filter Options**.
The top portion of the window displays the filter options.
- 2 Do one or more of the following:

- Click in the **Service Domain**, **Job Class**, or (in the case of the **Schedule** tab) **Status** field and select the values you want to use as the basis for the filter. For example, in the **Job Class** field, select **RptPrint** if you only want to view Print Report jobs.
 - In the case of the **Schedule** tab, click the calendar icon, and in the **Calendar** box, select the date of the job schedule you want to view. You can only select the current and future dates. Note that when you view jobs scheduled for a future date, the skip jobs functionality is disabled.
 - In the case of the **Logs** tab, specify a start date, an end date, or both. For example, if you only want to view logs that were generated after April 1, 2004, activate the **From** field and enter **04/01/2004**, or use the **Calendar** box and select the date. Logs generated before that date will be filtered from view.
- 3 Optionally, click **Enable Filter Options** to filter the information in the tab page with the settings you just specified.
 - 4 Optionally, click **Hide Filter Options** to remove the filter options from view.

Showing job and log details

To view more information about a job or log, click the link in the **Job Description** column. In the **Schedule** and **Jobs** tabs, this opens the **Job Details** pop-up window, which shows the owner of the job, its priority, and additional parameters. In the **Logs** tab, this opens the **Log Details** pop-up window, which shows the individual entries for that log.

- To view the details for all the jobs or logs, click **Show Details**.
- To close a **Details** window, click the **Hide Details** link for individual jobs or logs, or click the **Hide Details** button, which closes all open **Details** windows.

The **Job Details** window displays different information about a job depending on the tab from which it is opened. When opened from the **Jobs** tab, the **Job Details** window displays the same information about a job as it does when opened from the **Schedule** tab, however, from the **Jobs** tab, the window also shows the weekly processing schedule of the job. Job Details windows feature links that let you open the other Details windows for the same job in different tabs.

Test Connect

In the **Test Connect** page of Stat[®] Web, you can validate the connections for Databases, File Servers, E-Mail servers, and 3rd Party Version Control tools.

To test connections in Stat Web:

- 1 Click **Test Connect** in the user account drop-down menu. This opens the **Stat Test Connect** window.
- 2 Open the tab page corresponding to the type of connection you want to test.
- 3 Select each item you want to test.
- 4 Click **Test Selected**.

Stat Web attempts to establish a connection to the selected items. For each item, the **Status** column displays **OK** if the connection is successful, and if unsuccessful, it displays an error message explaining the reason why, the **Status** column displays an error message stating the cause of the failure.

- i** | **NOTE:** When testing environment connections, Stat Web attempts to connect using the Host, Port, Service Name, or TNS Entry values specified in the Stat maintenance tables for each particular environment. If there is no TNS Entry value specified for an environment, it uses the Host/Port/Service Name values. If a TNS Entry value is specified, it uses that value and disregards the others.

Reports

Stat[®] Web users can view reports on demand, meaning they can be viewed by Stat Web account holders at any time, not according to the time the reports are scheduled in the Stat Windows client to be emailed, exported, or printed. Reports generated through Stat Web are displayed as PDF files in the browser window or as Excel[®] files.

To view a report in Stat Web, the report must have available criteria that was previously defined and saved in the Stat Windows client.

Running reports

To run reports in Stat Web:

- 1 Click **Reports** in the user account drop-down menu to open the Stat[®] Web Report Viewer.

To run reports through Stat Web, the report criteria must have already been defined in the Stat Windows Client.

- 2 Select the category of the report.
- 3 Select the report you want to run.
- 4 Select the report criteria.

Options include both system criteria or personal criteria. After you make your selection, the Stat Web Report Viewer shows the criteria values.

- 5 Specify if you want to include a cover page with the report.

i | **NOTE:** The cover page option is not enabled for Excel reports.

- 6 Click **Generate**.

Stat Web generates the report and, depending on the type of report, displays it either as a PDF or an Excel file.

We are more than just a name

We are on a quest to make your information technology work harder for you. That is why we build community-driven software solutions that help you spend less time on IT administration and more time on business innovation. We help you modernize your data center, get you to the cloud quicker and provide the expertise, security and accessibility you need to grow your data-driven business. Combined with Quest's invitation to the global community to be a part of its innovation, and our firm commitment to ensuring customer satisfaction, we continue to deliver solutions that have a real impact on our customers today and leave a legacy we are proud of. We are challenging the status quo by transforming into a new software company. And as your partner, we work tirelessly to make sure your information technology is designed for you and by you. This is our mission, and we are in this together. Welcome to a new Quest. You are invited to Join the Innovation™.

Our brand, our vision. Together.

Our logo reflects our story: innovation, community and support. An important part of this story begins with the letter Q. It is a perfect circle, representing our commitment to technological precision and strength. The space in the Q itself symbolizes our need to add the missing piece—you—to the community, to the new Quest.

Contacting Quest

For sales or other inquiries, visit <https://www.quest.com/company/contact-us.aspx> or call +1-949-754-8000.

Technical support resources

Technical support is available to Quest customers with a valid maintenance contract and customers who have trial versions. You can access the Quest Support Portal at <https://support.quest.com>.

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal enables you to:

- Submit and manage a Service Request.
- View Knowledge Base articles.
- Sign up for product notifications.
- Download software and technical documentation.
- View how-to-videos.
- Engage in community discussions.
- Chat with support engineers online.
- View services to assist you with your product.

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