

PeopleSoft®

PeopleSoft EnterpriseOne CRM Support Applications 8.11 Reports

November 2004

PeopleSoft EnterpriseOne CRM Support Applications 8.11 Reports
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About This PeopleBook Preface

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- Related documentation.
- Comments and suggestions.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

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You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

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See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

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PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

CHAPTER 1

PeopleSoft EnterpriseOne CRM Support Applications Reports

This appendix provides an overview of PeopleSoft EnterpriseOne CRM Support Applications reports and enables you to view summary tables for all reports.

Note. For samples of these reports, see the PDF files that are published on CD-ROM with your documentation.

PeopleSoft EnterpriseOne CRM Support Applications Reports: A to Z

These tables list the PeopleSoft EnterpriseOne CRM Support Applications reports.

Support Applications Reports

Report ID and Report Name	Description	Navigation
R17670 Case Detail/Summary Report	Run different versions of this report to display and organize detail or summary information for closed cases. Versions have been set up to organize cases using these methods: <ul style="list-style-type: none">• Case by provider group – version XJDE0001• Case by product model – version XJDE0002• Case by environment – version XJDE0003• Case by equipment number – version XJDE0004	Case (G90CE0201), Case Detail Summary Report
R17671 Case Statistics by Assignee	Use this report to create reports that display close cases by: <ul style="list-style-type: none">• Assignee – version XJDE0001• Provider group – version XJDE0002	Case (G90CE0201), Case Statistics by Assignee

Report ID and Report Name	Description	Navigation
R17672 Case Statistics by Product	Use this report to create reports that display closed case statistics and organize the report by any of these methods: <ul style="list-style-type: none"> • Cases by product model – version XJDE0001 • Cases by environment – version XJDE0002 • Cases by equipment number – version XJDE0003 • Cases by item number – version XJDE0004 • Cases by provider group – version XJDE0005 	Case (G90CE0201), Case Statistics by Product
R17673 Case Duration Statistics by Product	Use this report to create reports that display the duration of closed cases and organize the report by any of these methods: <ul style="list-style-type: none"> • Cases by product model – version XJDE0001 • Cases by environment – version XJDE0002 • Cases by equipment number – version XJDE0003 • Cases by item number – version XJDE0004 • Cases by provider group – version XJDE0005 	Case (G90CE0201), Case Statistics by Product
R17674 Print Case	Use this report to print case information. Through the processing options, you can specify to print associated media objects.	Case (G90CE0201), Case Print
R17680 Escalated Cases	If you are escalating cases using the notification method, run this report to check for cases that the system needs to escalate. See .	Case (G90CE0201), Escalation Processing
R90CG700 Cases by Customers Report	Use this report to review cases by customer. The last page of this report contains a summary that lists the quantity of case records included in the report for each customer.	Case (G90CE0201), Cases By Customer

Report ID and Report Name	Description	Navigation
R90CG701 Cases by Priority Report	Use this report to view cases organized by priority (user defined code [UDC] 17/PR). Cases are then sub-grouped by customer. The last page of this report contains a summary that lists the quantity of case records included in the report for each case priority.	Case (G90CE0201), Cases By Priority
R90CG702 Cases by Status Report	Use this report to view cases organized by status (UDC 17/ST). Cases are then sub-grouped by customer. The last page of this report contains a summary that lists the quantity of case records included in the report for each status.	Case (G90CE0201), Cases By Status
R90CG703 Cases By Type Report	Use this report to view cases organized by type (UDC 17/CT). Cases are then sub-grouped by customer. The last page of this report contains a summary that lists the quantity of case records included in the report for each case type.	Case (G90CE0201), Cases By Type
R90CG704 Cases Status By Agent Report	Use this report to review case status organized by call center agent.	Case (G90CE0201), Cases Status By Agent
R90CG705 Case Analysis By Product Family	Use this report to review case information organized by product family (UDC 17/PA).	Case (G90CE0201), Case Analysis By Product Family

Action Plan/Activity Reports

Report ID and Report Name	Description	Navigation
R90CA014A Action Plan List	Use this report to view all summary information about all action plans, such as the description of the plan and the list of included activities. The report also includes additional information about each activity, such as the activity type, the assignee, when the activity should begin, and when the activity should be completed.	Action Plan/Activity (G90CE0202), Action Plan Listing

Report ID and Report Name	Description	Navigation
R90CA1301B Activities by a Customer Contact	Use this report to view all assigned activities for each customer. The activities are grouped by customer and include each activity's contact name, phone number, description, date scheduled, start time, and activity type.	Action Plan/Activity (G90CE0202), Activity-Activities By Customer
R90CA13D Periodic Planner	Use this report to display selected user schedules, including activities and to-do items, for a specified period of time. The report also includes all related details for each activity or to-do item.	Action Plan/Activity (G90CE0202), Activity-Periodic Planner

Competitor Reports

Report ID and Report Name	Description	Navigation
R90CA060A Competitor Item Sheet Detail	Use this report to view all information about a competitor and the competitor's products. You can use this report to compare the products from your organization with those of your competitors.	Competitor G90CE0203), Competitor Price Selected

Customer Reports

Report ID and Report Name	Description	Navigation
R90CA0111A Contacts for a Customer	Use this report to view each contact, along with the associated contact information for each selected customer.	Customer (G90CE0204), Contacts By Customer
R90CA080B Customer/Contact Summary-Sel	Use this report to view summary information for all customer records in the system. The report includes the associated contact names for each customer, along with information for each contact.	Customer (G90CE0204), Customer Contact Summary
R90CA080G Customer Summary - Selected	Use this report to view summary information about selected customers, such as sales team members, opportunities, and contacts.	Customer (G90CE0204), Customer Summary

Employee Report

Report ID and Report Name	Description	Navigation
R90CA0101E Employee Phone List	Use this report to view all active employees in the system, along with their titles and phone numbers.	Employee (G90CE0205), Employee Phone List

Partner Report

Report ID and Report Name	Description	Navigation
R90CA01B Customer Partner List	Use this report to view all partners in the system, along with summary information about each partner, such as the name, address, contact information, and URL.	Partner (G90CE0206), Partner List

Contact Reports

Report ID and Report Name	Description	Navigation
R90CA070AA Contact Address Avery 5163	Use this report to produce shipping labels for each contact in the system in Avery 5163 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Case (G90CE0201), Contact Address Shipping (Avery 5163)
R90CA070B Contact Address Avery 5160	Use this report to produce mailing labels for each contact in the system in Avery 5160 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Case (G90CE0201), Contact Address Shipping (Avery 5160)
R90CA070C Contact Address Avery 5161	Use this report to produce mailing labels for each contact in the system in Avery 5161 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Case (G90CE0201), Contact Address Shipping (Avery 5161)

Product Catalog Report

Report ID and Report Name	Description	Navigation
R90CA55CAT Product Catalog List	Use this report to view all product catalogs, along with the available products that are associated with each catalog.	Product Catalog (G90CE0108), Product Catalog List

CHAPTER 2

Report Samples

This chapter provides report samples.

For the online samples of these reports, see the PDF files that are published on CD-ROM with your online documentation.

John Franks
ABC Inc.

John Doe
Capital System

Joe Smith
Capital System

Herbert Norville
Central Gas Stations

Williams, Beth
Continental Incorporated

Allen, Geoff
Continental Incorporated

James Smart
Custom Brokers

Thomas DeFranco
Fireweed Designs

Global Enterprises

Julie Breser
Global Enterprises

Robert Ugger
Global Enterprises

Nina Rodriguez
Global Enterprises

Thomas Dufour
Global Industries

Thomas De Franco
Global Industries

Thomas DeFranco
Global Industries

Joe Smith
Global Travel

Mary Helen Kennedy
Global Travel

Morris, Jennifer
Global Travel
245 Business Loop

San Francisco CA 98045

Morris, Julie
Global Travel
245 Business Loop

Mary Johnson
Lewis Enterprises

San Francisco CA 98045

Worldwide Company
Case Statistics by Assignee

Address Number	Assignee Name	Case Type	Days on Line	Total Time	Average Calls per Day	Average Time per Day	Average Time per Request	Handled Live		Handled Normal	
								Number	% of Total	Number	% of Total
2006	Walters, Annette	1						5	100.00		
		Total						5	100.00		
5056	Carmichael, Bradley P.	1	467	11,180.75	0.00	23.94	5,590.37	2	100.00		
		Total	467	11,180.75	0.00	23.94	5,590.37	2	100.00		
7504	Meade, Jane	1	486	11,612.25	.01	23.89	3,870.75	3	100.00		
		Total	486	11,612.25	.01	23.89	3,870.75	3	100.00		
7505	Mastro, Robert	3	492	11,756.25	.01	23.89	3,918.75			3	100.00
		Total	492	11,756.25	.01	23.89	3,918.75			3	100.00

Case Duration Statistics by
Products

Equipment Number	Request Type	Average Request Duration	% Under 3 Hours	% Over 1 Day	% Within Commitment	% Under 3 Minutes	% Over 10 Minutes
31430	1	.00	100.00	.00	100.00	100.00	.00
	Total	.00	100.00	.00	100.00	100.00	.00
31456	1	.00	100.00	.00	100.00	100.00	.00
	Total	.00	100.00	.00	100.00	100.00	.00
32504	1	.00	100.00	.00	100.00	100.00	.00
	Total	.00	100.00	.00	100.00	100.00	.00
32521	1	8,036.75	.00	100.00	100.00	.00	100.00
	Total	8,036.75	.00	100.00	100.00	.00	100.00
32580	1	2,782.75	33.33	100.00	100.00	.00	100.00
32580	3	2,830.75	33.33	100.00	100.00	.00	100.00
	Total	2,806.75	33.33	100.00	100.00	.00	100.00

Case Information

4	CL	Call	Problem	NONE OF THE LIGHTS LIGHT UP ON THE CBX						
Customer Number	4242	Capital System	Phone	404	555-6389	Call Backs	.	Prov Group	60001	Computerized Branch Exch.
Caller Number	4242	Capital System	Case Reason	150	Product Failure	Case Status	999 Complete	Assignee No.	2006	Walters, Annette
Caller Name	JOE SMITH		Case Type	1	Live	Language	E English	ACD No.	2006	
E-Mail Address			Priority	1	Critical	Region	.			

Product Information

Equipment Number	31430	Phone Switch	Product Model	C200	CBX Model 200	Product Component	.
Inventory Item No.	7101	Phone Switch	Product Family	CBX	Computerized Branch Exchange	Environment	.
Branch/Lot Number	M30						

Dates/Times

Beginning Date/Time	6/17/2005 14:17:00	On Site Date/Time	00:00:00	Committed Date/Time	6/17/2005 00:2.:00	Response Time	2.00
Returned Date/Time	10/13/1998 14:53:00	Completed Date/Time	10/27/1999 10:42:58	Commit Duration	00:00:00	Time Zone	42 Mountain Time (US & Canada)

Additional Case Information

Parent Case Number	Action Message	Claim Number	Tickler Date
Case Source	1	Site Number	4242 Capital System
		Service Order	Tickler Description

Equipment Category Code Information

Category Code 01	.	Category Code 05	.	Category Code 09	.
Category Code 02	.	Category Code 06	.	Category Code 10	.
Category Code 03	.	Category Code 07	.		
Category Code 04	.	Category Code 08	.		

Case Category Code Information

Category Code 01	.	Category Code 05	.	Category Code 09	.
Category Code 02	.	Category Code 06	.	Category Code 10	.
Category Code 03	.	Category Code 07	.		
Category Code 04	.	Category Code 08	.		

Accounting Information

Contract Number	30	CM 00200	1 001	Entitlement Check	1	Method of Pricing	F
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Employee Phone List

Worldwide Company

Name	Title	Work Number
AB Common		303 844-8000
Abbott, Dominique		
Abrams, Brooke		303 555-1082
Aiken, Gwen		
Allen, Ray		
Almeida, Wendy		
Ambrosini, Rosa		
Ana Maria Lozano Gonzalez		
Anderson, Jeanette		
Arnold, Susan		
Ato, Connie		
Barnes, Troy		
Baxter, Frank T.		
Beales, Aaron		
Beck, Jeremy		
Bellas, Debbie		
Bennett, Jody		
Berkson, Lisa		303 770-7700
Boles, Raymond W.		
Borgerding, Jillian		
Borgerding, Libby		303 346-8545
Born, Joseph T.		
Breckenridge, Tandaleah		
Breton, Josephine		
Brown, Daniel		
Brown, Harvey J.		
Bryant, Melissa		303 770-7700
Buckman, Heather		303 770-7700
Carmichael, Bradley P.		
Carson, Elise		303 770-7700
Chamberlain, Carol M.		
Chambers, Cynthia L.		
Chan, Jeanne		
Chang, Steven		
Chartrand, Jean-Pierre		
Chrisman, Diane		303 770-7700
Cohen, Andrea M.		
Connor James		
Corriveau, Andree		
Crockett, Lyndsey		303 770-7700
Crowley, Barbara		303 770-7700
Cruz, Jeffrey		

Worldwide Company
Contacts for a Customer

AB Common

Name	Work Number	Fax Number	Title	Address	City	State
Hansen, Tom			Billing Supervisor			
Alexander, Caryn			President			

Global Enterprises

Name	Work Number	Fax Number	Title	Address	City	State
Robert Ugger	212 629-3303		President			
Julie Breser	212 629-3320		Billing Auditor			

Continental Incorporated

Name	Work Number	Fax Number	Title	Address	City	State
Williams, Beth			President - CEO			
Allen, Geoff			Finance Manager			

Lewis Enterprises

Name	Work Number	Fax Number	Title	Address	City	State
Mary Johnson			Communications Manager			

Capital System

Name	Work Number	Fax Number	Title	Address	City	State
Joe Smith			Senior Technical Advisor			
John Doe	404 555-9977					

Custom Brokers

Name	Work Number	Fax Number	Title	Address	City	State
James Smart						

Central Gas Stations

Name	Work Number	Fax Number	Title	Address	City	State
Herbert Norville			IT Supervisor			

Maddox Industries

Name	Work Number	Fax Number	Title	Address	City	State
John Maddox						

Action Plan Listing
Worldwide Company**Closing case for Cement Inc**

Description This is my action plan for closing cases

Welcome Meeting

Activity Type	MEETING
Assigned To	Jillian Smith
Start Time	9/30/2004
Number of Days	1
Commitment Level	1

Getting started with new products

Activity Type	MEETING
Assigned To	Jillian Smith
Start Time	9/30/2004
Number of Days	1
Commitment Level	1

Regular maintenance meeting

Activity Type	MEETING
Assigned To	Jillian Smith
Start Time	9/30/2004
Number of Days	1
Commitment Level	1

Worldwide Company
Competitor Item Sheet Detail

Competitor: Widgets, Inc.

Address: 4500 Industrial Drive
Denver CO

Number Of Employees 3800
Annual Revenues 1,500,000.00

Phone:
Fax:
url:

Competitive Information

Competitor Item: Current price .89 ea, LESS than ours 2/15/04
Our Item: 2206 Piston
Extended Description:

Competitor Item: Current price 2.49 ea, MORE than ours 2/15/04
Our Item: 2209 Bracket, Top
Extended Description:

Competitor Item: They are out of stock on this item 2/15/04
Our Item: 2210 Bracket, Bottom
Extended Description:

Worldwide Company
Activities by Customer Contact

Global Travel

Morris, Jennifer

Subject	Activity Type	Time Date Start	Time Date End
Follow up per our conversation	E-mail	9/24/2004	9/24/2004
Follow up phone call	Meeting	9/24/2004	9/24/2004
Follow up with Jennifer Morris	Meeting	9/30/2004	9/30/2004

Activities for Global Travel

3

From Date 4/1/2004 14:02:43 (UTC)

To Date 12/22/2004 17:53:18 (UTC)

Financial/Distribution

Company

Activity

To Do

Marketing Company

Activity

To Do

Eastern Area Distribution

Cent

Activity

To Do

Prueba - Argentina - 28

Activity

To Do

Project Management

Company

Activity

To Do

Financial Reporting

Company

Activity

To Do

Luxe de France

Activity

To Do

Cascades, Ltd.

Activity

To Do

Bikes

Bike Accessories

1001	Bike Rack - Trunk Mount
2600	Bike Trailer

Spare Parts

2017	Seat
2021	Handle Bar
2023	Pedal, Left

Touring Bikes

220	Touring Bike, Red
221	Touring Bike, Blue
222	Touring Bike, Green
250	Prototype Racing Bike
255	Prototype Racing Bike

Mountain Bikes

210	Mountain Bike, Red
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Youth Bikes

230	Youth Sport Bike
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Bike Trailer

1001	Bike Rack - Trunk Mount
2600	Bike Trailer

Bike Rack

1001	Bike Rack - Trunk Mount
2600	Bike Trailer

Handle Bar

2017	Seat
2021	Handle Bar
2023	Pedal, Left

Seat

2017	Seat
2021	Handle Bar
2023	Pedal, Left

Left Pedal

2017	Seat
2021	Handle Bar
2023	Pedal, Left

Green Touring Bike

220	Touring Bike, Red
221	Touring Bike, Blue
222	Touring Bike, Green

PeopleSoft E1
Cases by Priority Report

Cases From Date: 1/1/1999 Through Date: 12/31/2005

Issue Priority: Priority**Customer Name: Lewis Enterprises**

Case ID	Type	Status	Begin Date	Ending Date	Case Summary
11	Live	Complete	7/1/2005	2/23/1999	THE CBX GOES DOWN WHEN THERE IS A HIGH VOLUME OF CALLS
371	Live	Open	2/20/2004		TEST
373	Live	Open	2/20/2004		TEST
376	Live	Open	2/20/2004		TEST
12891	Live	Open	10/22/2004		TEST

Worldwide Company
Cases by Status Report

Cases From Date: 1/1/1999 Through Date: 12/31/2005

Request Status: Open**Customer Name: Capital System**

Case ID	Type	Priority	Begin Date	Ending Date	Case Summary
9	Live	Priority	6/19/2005		ADDING NEW EXTENSIONS. WE ARE MOVING TO A NEW FLOOR OF OUR BUILDING AND WE NE
23	Live	Priority	3/22/2000		Electrical surge burned the circuits

Customer Name: Consolidated Fuel Brokers

16	Live	Standard	2/23/1999		NON-STANDARD CHARACTERS: WE NEED TO PRINT SOME MATERIAL WITH NON ENGLISH CHA
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Customer Name: Global Enterprises

17	Live	Case Escalated	2/23/1999		SERVER IS CRASHING SINCE WE BROUGHT UP SERVICES AGAIN.
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Customer Name: Global Travel

40	Live	Priority	9/27/2004		CAN'T LOCATE OFFICE
42	Live	Priority	10/1/2004		THIS IS A ACTION PLAN TEST
43	Live	Priority	10/1/2004		NOT WORKING

Customer Name: Manufacturing/Distribution Company

30	Live	Priority	6/1/2005		FORKLIFT ENGINE IS MIS-FIRING, CAUSING THE ENGINE TO PERIODICALLY STAHL.
32	Live	Priority	6/5/2005		NOZZLE MIS-SPRAY. HEAD DAMAGED.

Customer Name: Pacific Company, The

18	Live	Priority	2/23/1999		SOFTWARE HAS A BUG
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Worldwide Company
Case Analysis By Product Family Report

Cases From Date: 1/1/1999 Through Date: 12/31/2005

Product Family: Computerized Branch Exchange

Case ID	Case Description	Begin Date	Ending Date	Close Time in Hours	Status
4		6/17/2005	10/27/1999		History
11		7/1/2005	2/23/1999		History

of Cases: 2

Total Close Time: _____

Average Close Time: _____

Total # of Cases: 2

Total Closing Time: _____

Total Average Close Time: _____