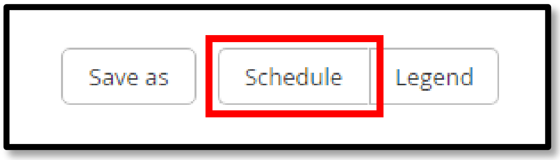
Scheduling a Report

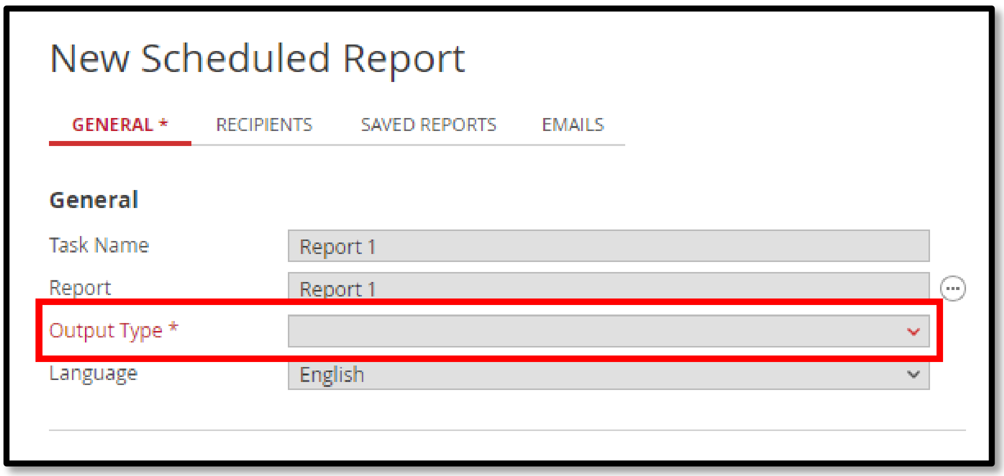
Scheduling a report will allow you to email a report in an Excel or PDF document.

Under the General tab

1. Click Schedule, choose the report you want to email, choose who the email will be sent from.

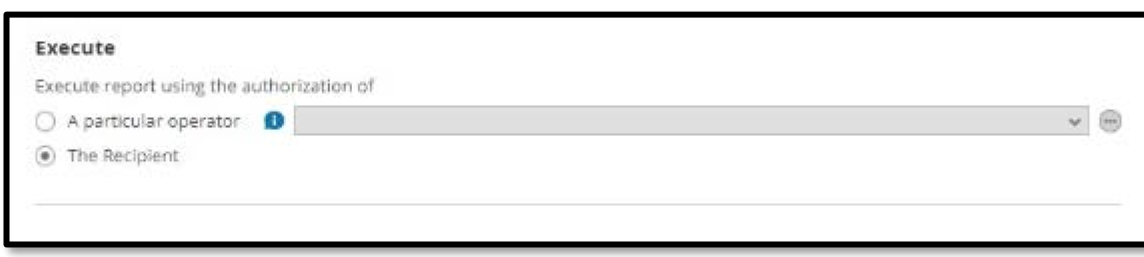


2. Choose output type (Excel or pdf).



3. Choose a subject title for the email and type your message.

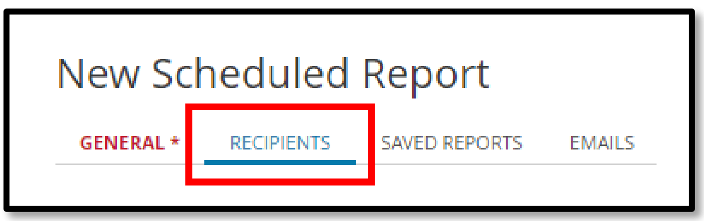
4. Choose who to send the report to. Under Execute, choose to send the report to a particular operator.



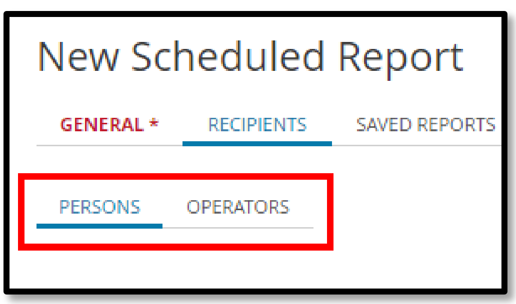
5. Choose the schedule for the emailed report where you will choose the interval and the run.

Under Recipients tab

1. Next, click on the **Recipients** tab.



2. Choose which **Persons** or **Operators** will receive the report.



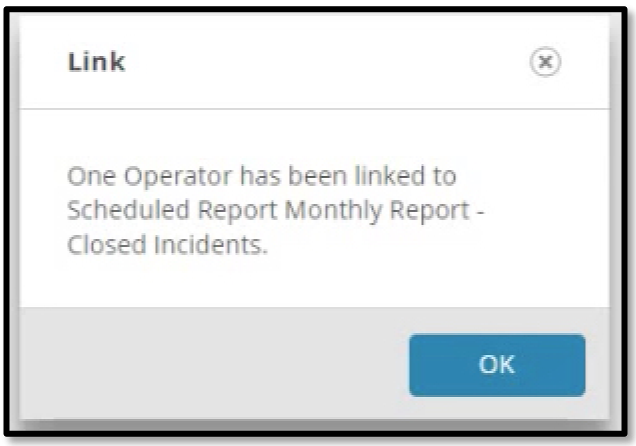
3. When choosing Operators you can use the **Links Wizard** to choose who to send the report to.

Note: The Links Wizard allows you to search the system for the operator you wish to send the report.

4. Once you find the person to send the report to, click **Link**.

A message will appear on screen that tell you a person has been linked to scheduled report.

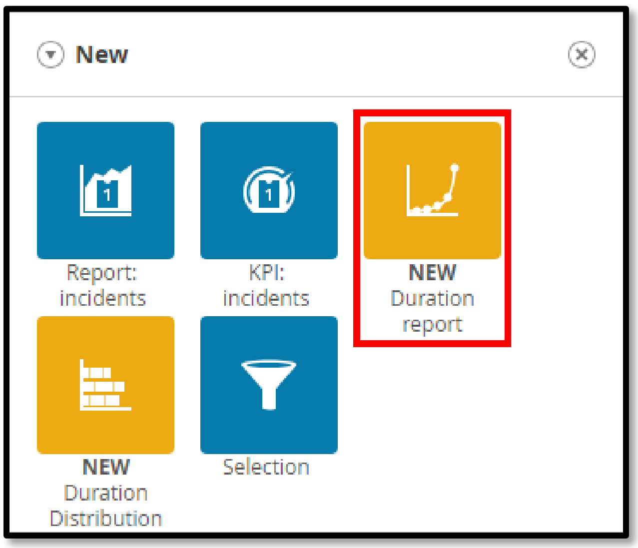
5. Click **OK**.



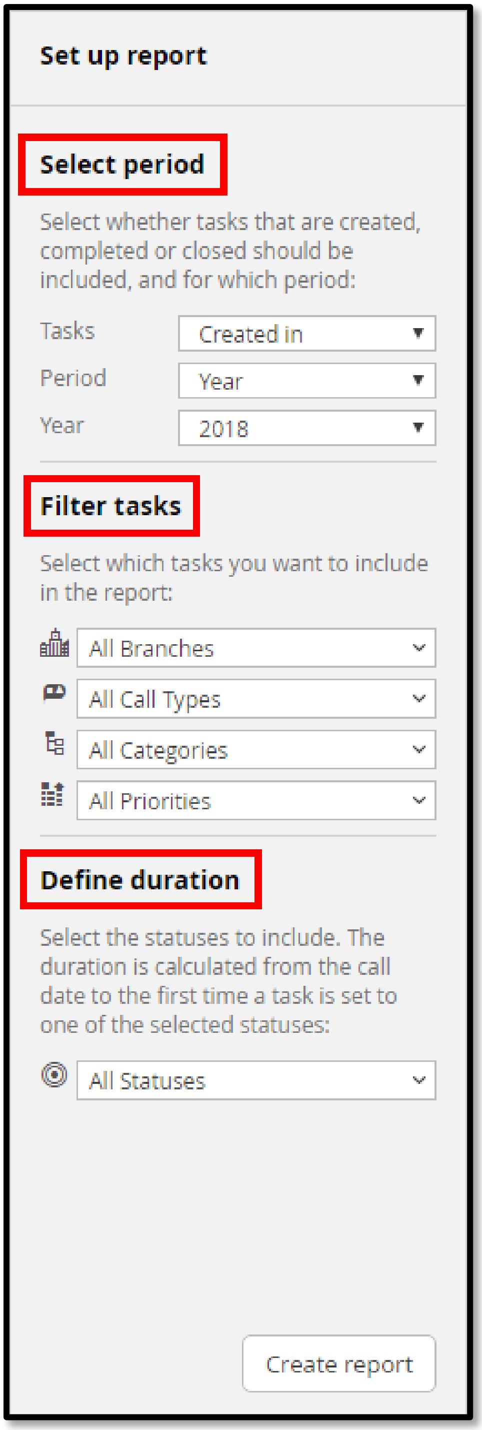
Creating a Duration Report

There are also two types of New reports implemented with this version of TOPdesk, The Duration Report and the Distribution Report. These can be accessed through the Dashboard Incident Management.

1. For a Duration Report, click the Duration Report widget. This will open a new tab for the Duration Report.



2. Here you select the period, filter tasks, and define the duration of the report.



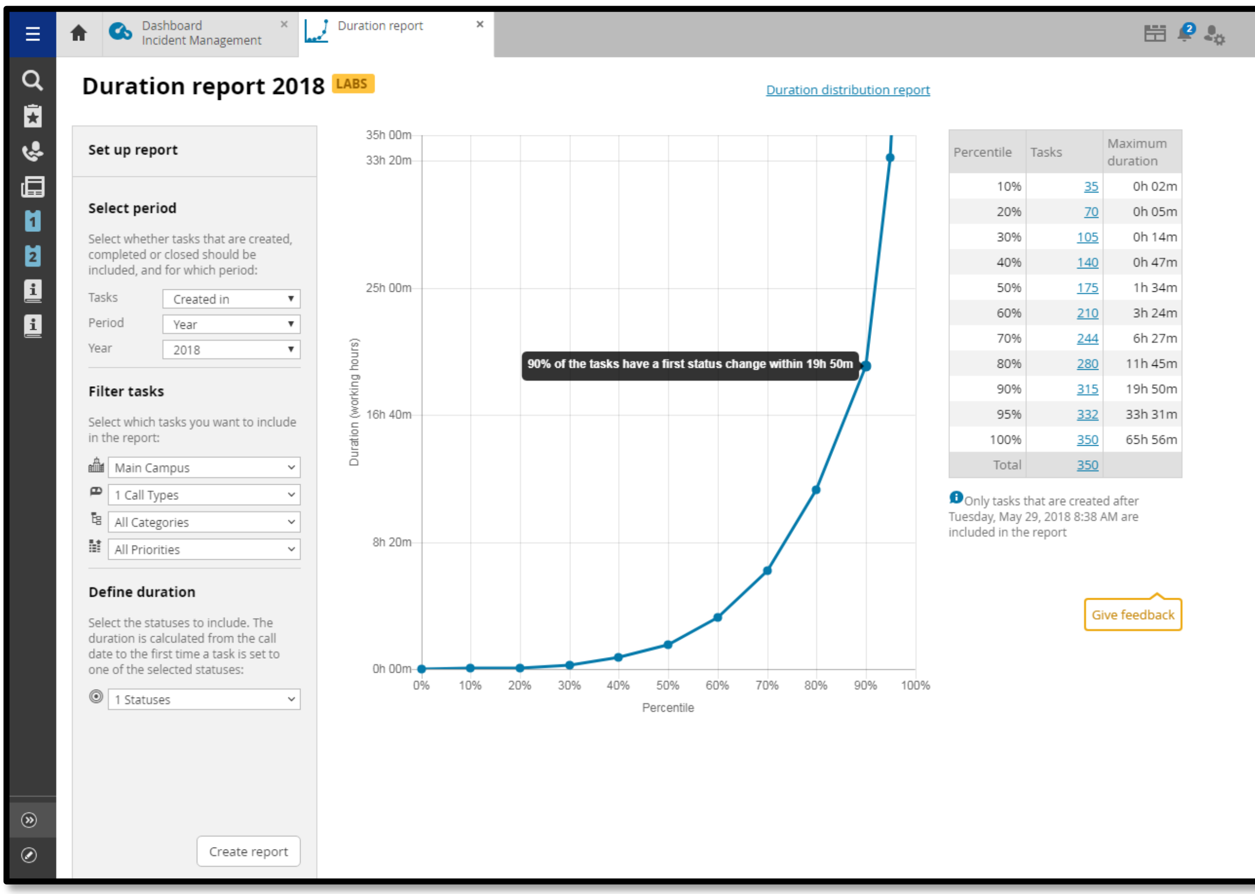
1. Select period:
   - **Tasks** options are Created in, Completed in, and Closed in.
   - **Period** options are Year, Quarter, and Month.

   Note: If you select Quarter or Month, another drop-down menu will appear for you to choose which Quarter/Month.

   - **Year** options are the last two years.
2. Filter tasks:
   - **Branches** options are the UofM campuses.
   - **Call Types** options are Issue, Request, and Question.
   - **Categories** options are the same as Incident categories.
   - **Priorities** options are Critical. High, Medium, Low, and Long Term.
3. Define Duration:
   - **Statuses** options are the same as Incident status options.

3. Click **Create Report**.

You will see a report with the criterion you selected in a graph and in a table. You can drag your cursor over the results on the graph to display the corresponding information in the table.

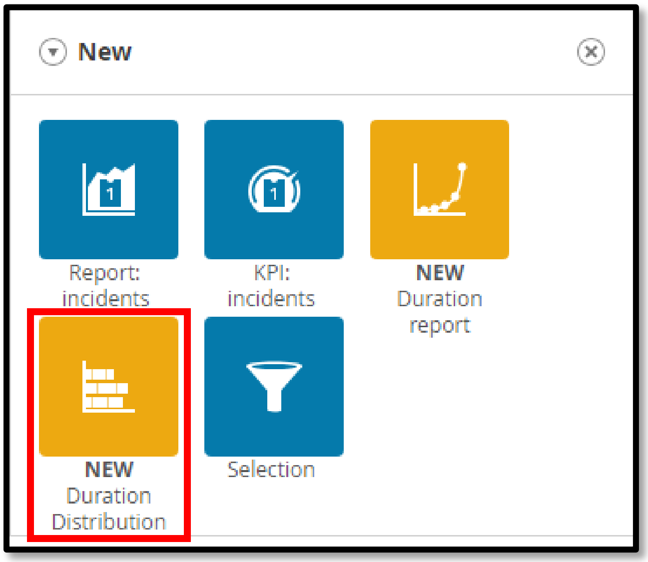


4. From here, you can change the selections you made. If you change the criterion, click **Create Report** again and you will see a report with the updated information.

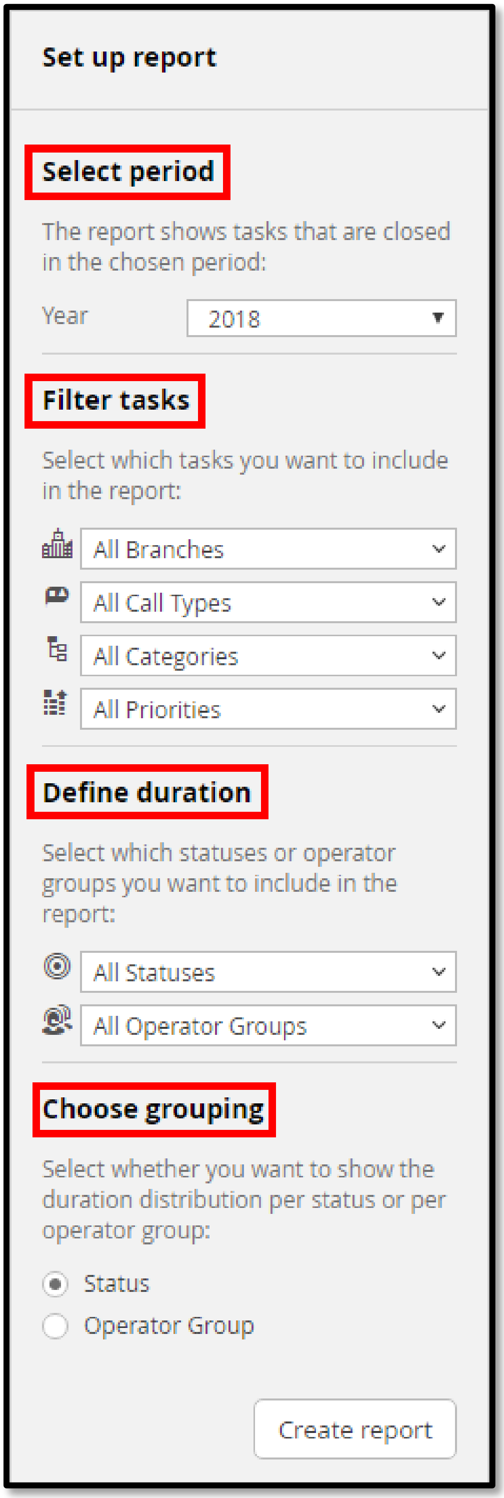
Note: If you change the criterion you will no longer see the report you previously created.

Creating a Distribution Report

1. For a Distribution Report, click the Distribution Report widget. This will open a new tab for the Distribution Report.



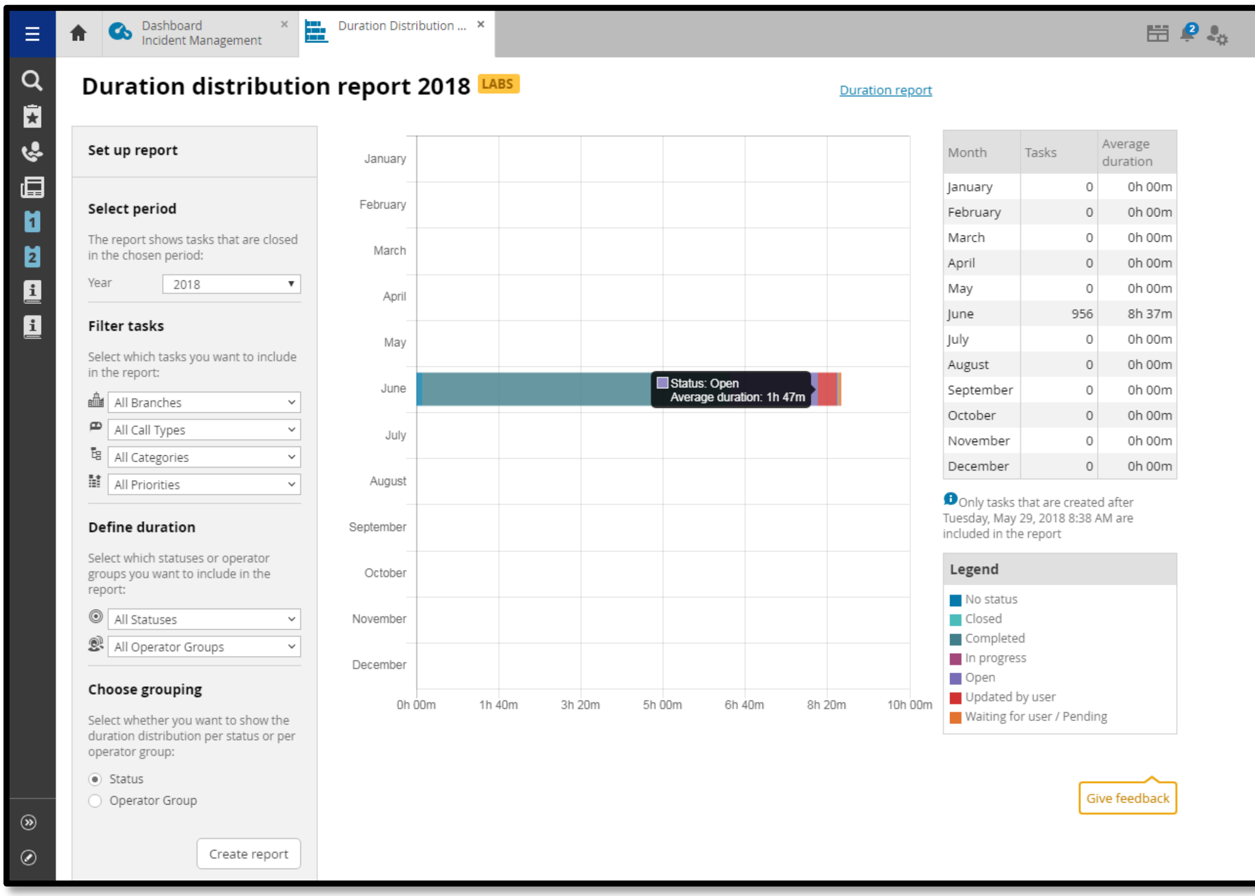
2. Here you select, the period, filter tasks, define duration, and choose the grouping (Status or Operator Group) of the report.



1. Select Period:
   - **Year** options are the last two years.
2. Filter Tasks:
   - **Branches** options are the UofM campuses.
   - **Call Types** options are Issue, Request, and Question.
   - **Categories** options are the same as Incident categories.
   - **Priorities** options are Critical. High, Medium, Low, and Long Term.
3. Define Duration:
   - **Statuses** options are the same as Incident status options.
   - **Operator Groups** options are the same as Incident Operator Groups.
4. Choose grouping:
   - Selecting **Status** or **Operator Group** determines how the information in the report is presented.

3. Click **Create Report**.

You will see a report with the criterion you selected displayed in a graph, a table, and a legend. You can drag your cursor over the results in the graph to display the corresponding information in the table.



4. From here, you can change the selections you made. If you change the criterion, click **Create Report** again and you will see a report with the updated information.

Note: If you change the criterion you will no longer see the report you previously created.