Creating Reports in TOPdesk

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Purpose

This training material highlights how to create reports in the TOPdesk ticket system.

Audience

University of Memphis staff responsible for entering and managing incident and service requests within TOPdesk

Getting Started

Creating Reports

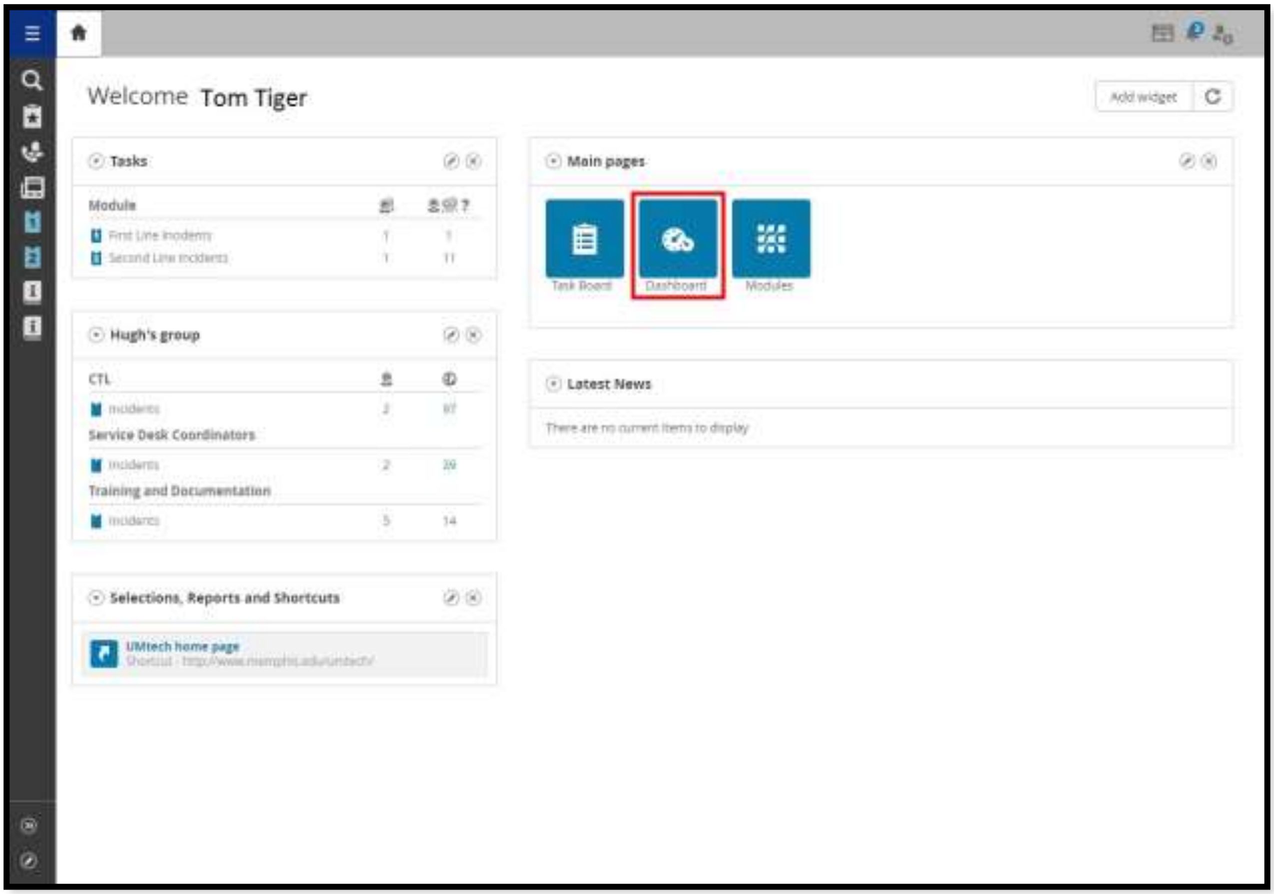
There are two methods of creating reports.

Method 1

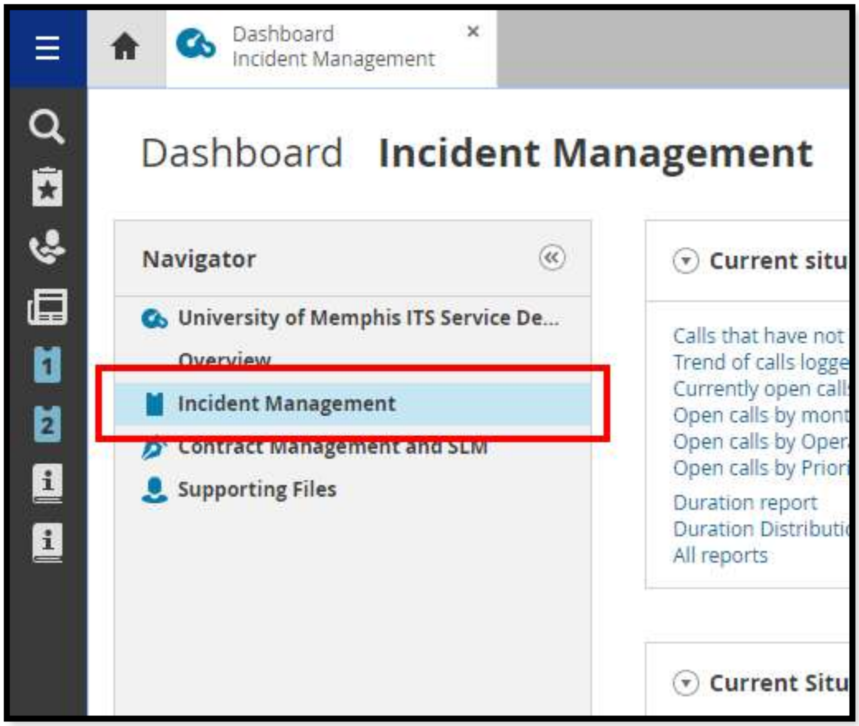
1. From the TOPdesk menu, Select New.
2. Then select Report.
3. Choose Incidents.

Method 2

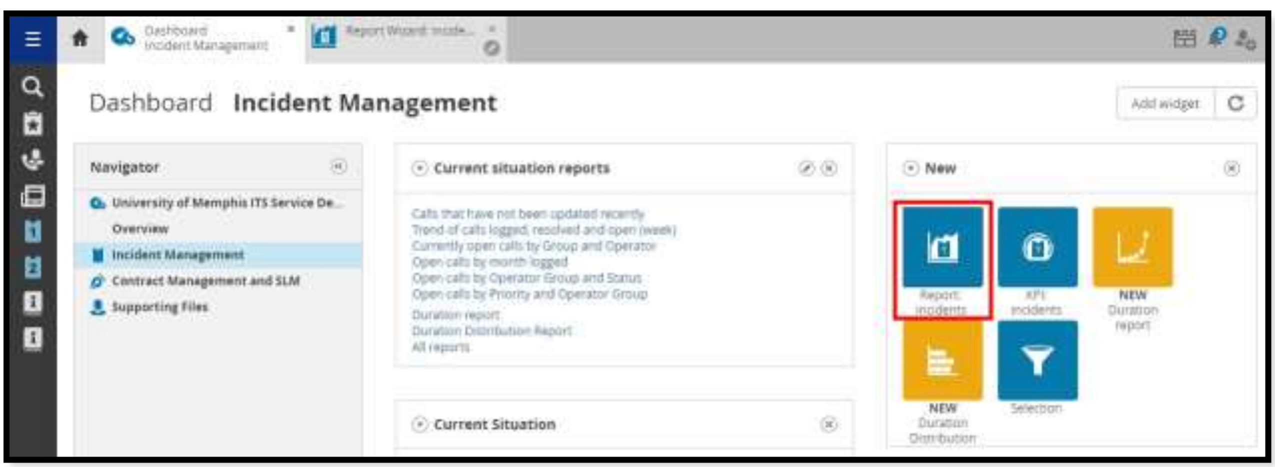
1. From main pages, select **Dashboard**.



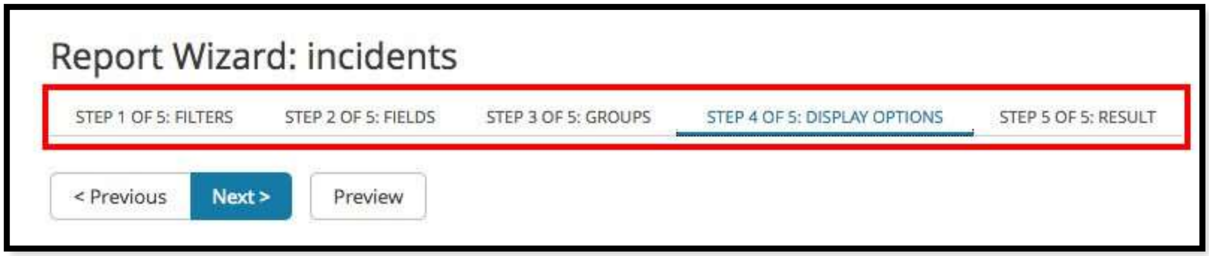
2. From the Navigator, select **Incident Management**.



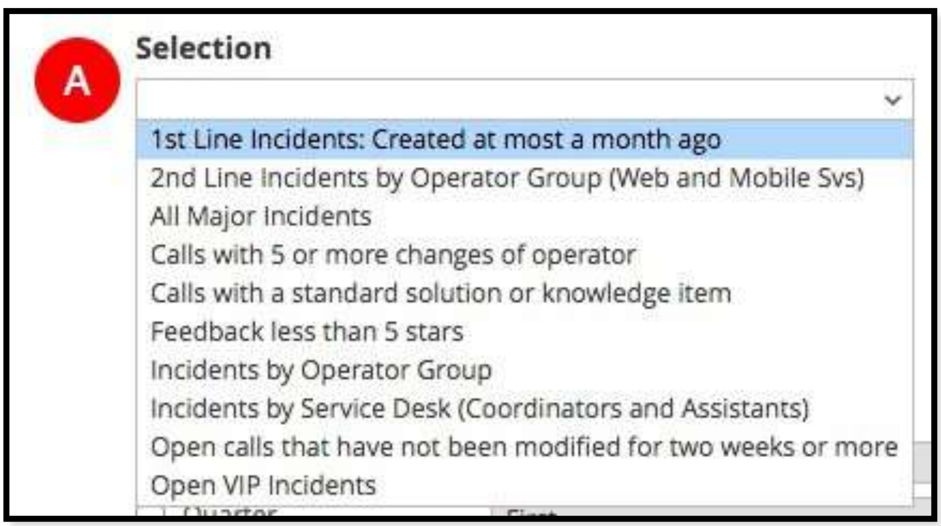
3. Select **Report: incidents**.



This will open the **Report Wizard**. There are five steps involved when using the Report Wizard.



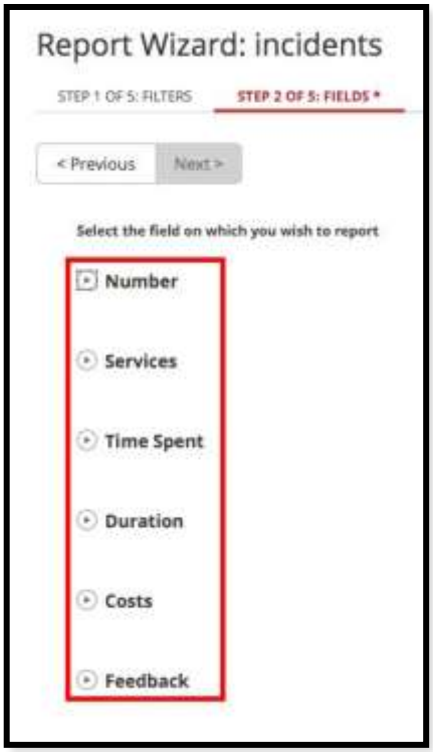
4. Once opened, the Report Wizard automatically takes you to Step 1 of 5: Filters to:
   A. You can choose from built in A) Selections or the B) Date Filter.



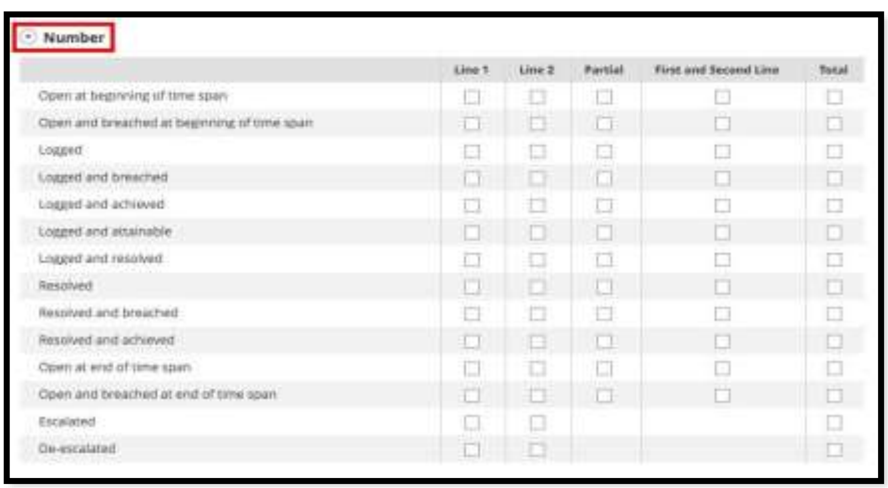
B. Options when choosing the B) **Date Filter**.

After you make your selection, click **Next**.

5. In Step 2 of 5: Fields, choose the fields you wish to report; choose from the following selections: Number, Services, Time Spent, Duration, Costs, and Feedback.



Click the drop-down arrow beside them to reveal choices from each.



Number

	Line 1	Line 2	Partial	First and Second Line	Total
Open at beginning of time span	☐	☐	☐	☐	☐
Open and breached at beginning of time span	☐	☐	☐	☐	☐
Logged	☐	☐	☐	☐	☐
Logged and breached	☐	☐	☐	☐	☐
Logged and achieved	☐	☐	☐	☐	☐
Logged and attainable	☐	☐	☐	☐	☐
Logged and resolved	☐	☐	☐	☐	☐
Resolved	☐	☐	☐	☐	☐
Resolved and breached	☐	☐	☐	☐	☐
Resolved and achieved	☐	☐	☐	☐	☐
Open at end of time span	☐	☐	☐	☐	☐
Open and breached at end of time span	☐	☐	☐	☐	☐
Escalated	☐	☐			☐
De-escalated	☐	☐			☐

Services

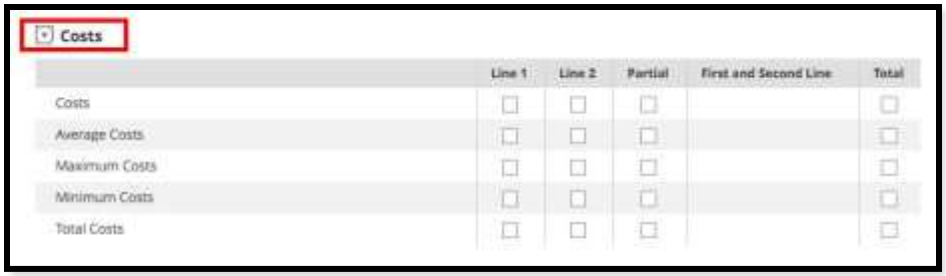
	Line 1	Line 2	Partial	First and Second Line	Total
Open at beginning of period and SLA target date breached	☐	☐	☐	☐	☐
Open at end of period and SLA target date breached	☐	☐	☐	☐	☐
Created in period and SLA target date not yet breached	☐	☐	☐	☐	☐
Created in period and SLA target date breached	☐	☐	☐	☐	☐
Resolved in period and SLA target date achieved	☐	☐	☐	☐	☐
Resolved in period and SLA target date breached	☐	☐	☐	☐	☐

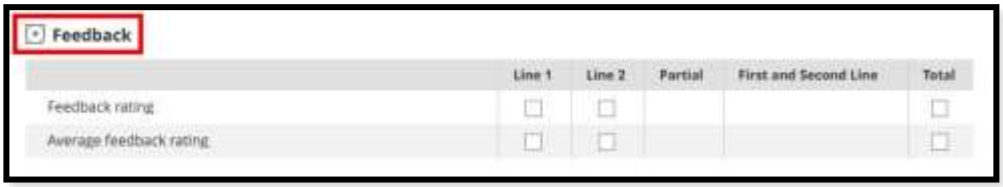
Time Spent

	Line 1	Line 2	Partial	First and Second Line	Total
Time Spent	☐	☐	☐		☐
Average time spent	☐	☐	☐		☐

Duration

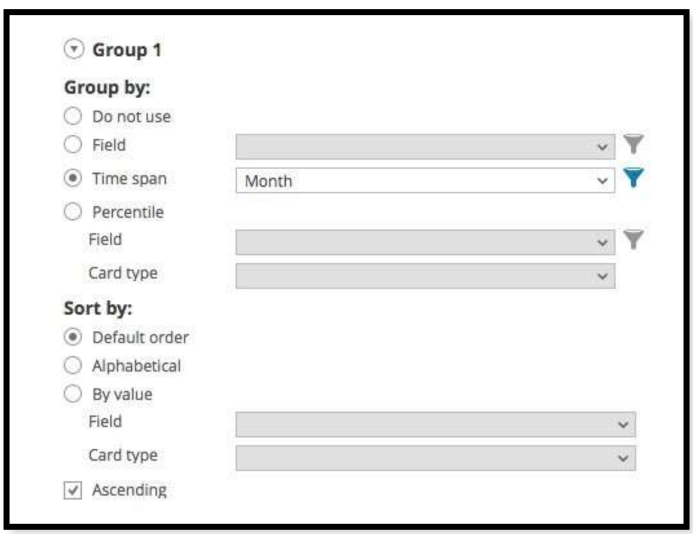
	Line 1	Line 2	Partial	First and Second Line	Total
Total actual duration	☐	☐	☐		☐
Average actual duration	☐	☐	☐		☐
Maximum actual duration	☐	☐	☐		☐
Minimum actual duration	☐	☐	☐		☐
Total 'On hold' duration	☐	☐	☐		☐
Average 'On hold' duration	☐	☐	☐		☐
Maximum 'On hold' duration	☐	☐	☐		☐
Minimum 'On hold' duration	☐	☐	☐		☐
Total adjusted duration	☐	☐	☐		☐
Average adjusted duration	☐	☐	☐		☐
Maximum adjusted duration	☐	☐	☐		☐
Minimum adjusted duration	☐	☐	☐		☐
Total 'Resolved' duration	☐	☐	☐		☐
Average 'Resolved' duration	☐	☐	☐		☐
Maximum 'Resolved' duration	☐	☐	☐		☐
Minimum 'Resolved' duration	☐	☐	☐		☐
Total 'In progress' duration	☐	☐	☐		☐
Average 'In progress' duration	☐	☐	☐		☐
Maximum 'In progress' duration	☐	☐	☐		☐
Minimum 'In progress' duration	☐	☐	☐		☐

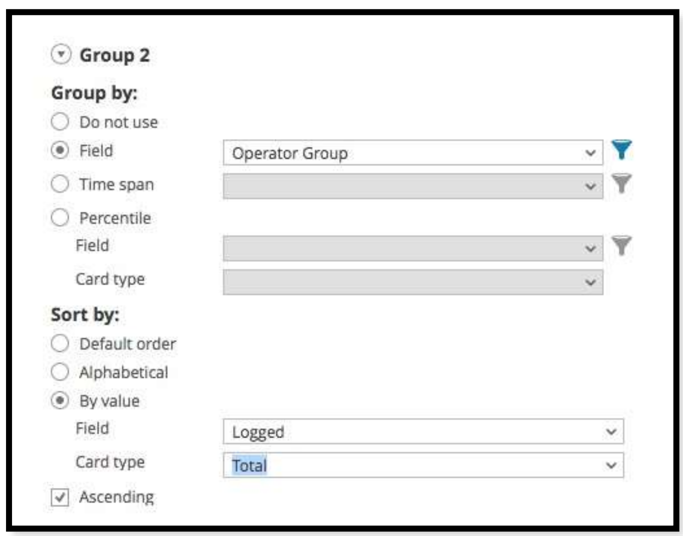




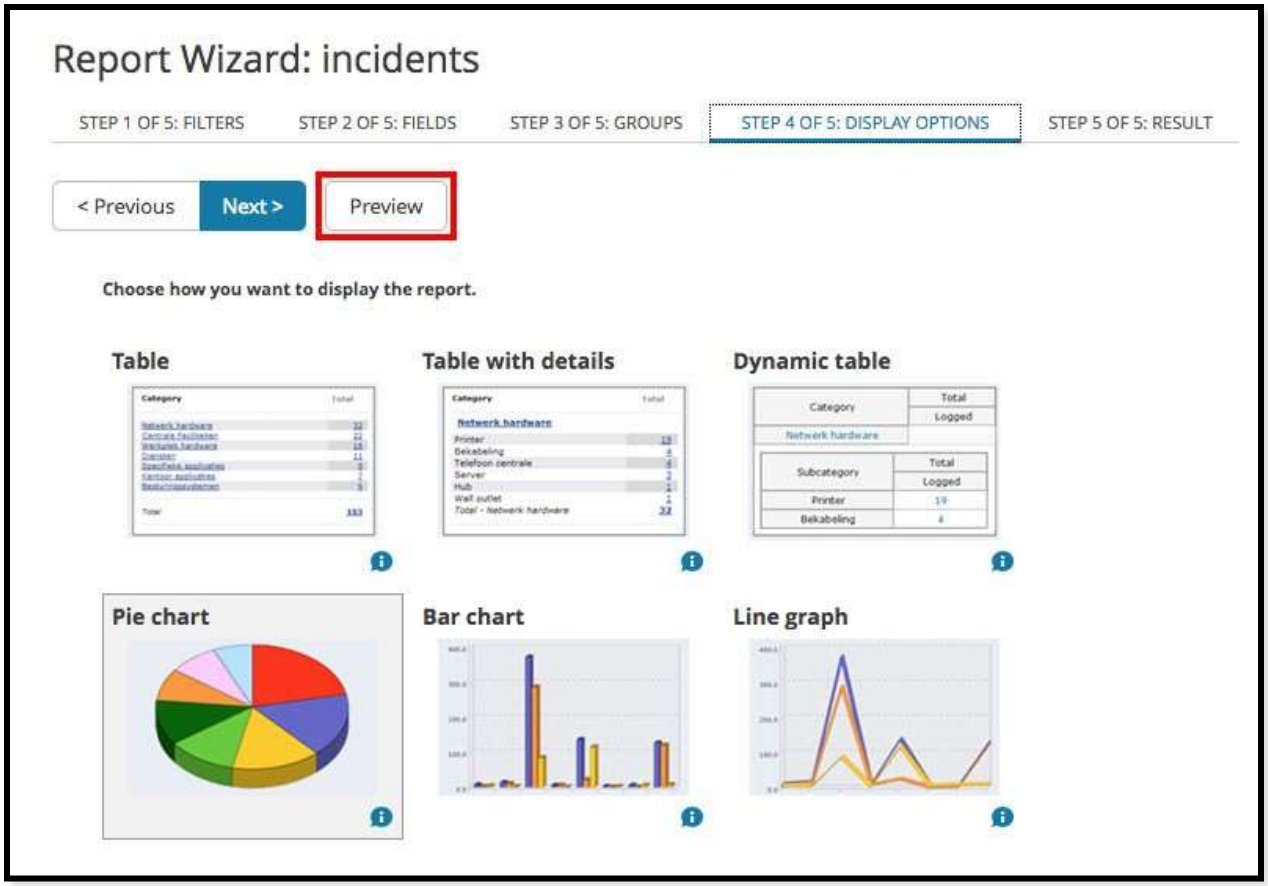
6. Make your selections and click Next.
7. In Step 3 of 5: Groups, choose the groups to filter in Group 1, 2, and 3.

Note: You can also choose how the data is sorted for each group. Select how each filter is sorted and click Next.



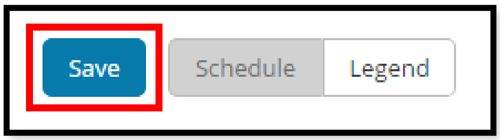


8. In Step 4 of 5: Display Options, choose the method to display from the icons. Choose from: Table, Table with details, Dynamic Table, Pie Chart, Bar Chart, or Line Graph. Click Preview to view how the data will look.



Note: *Each chart is interactive and can be drilled down in views.*

9. Next, save your report. Create a name, description, and in “To be used by”, choose the permission level of your report. Click Save. Once the report is saved you can view it on your dashboard. You will need to add the Report/KPI widget to your Main Pages. (See Adding Widgets section)

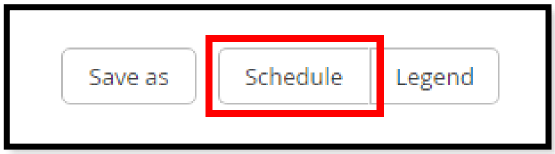


Scheduling a Report

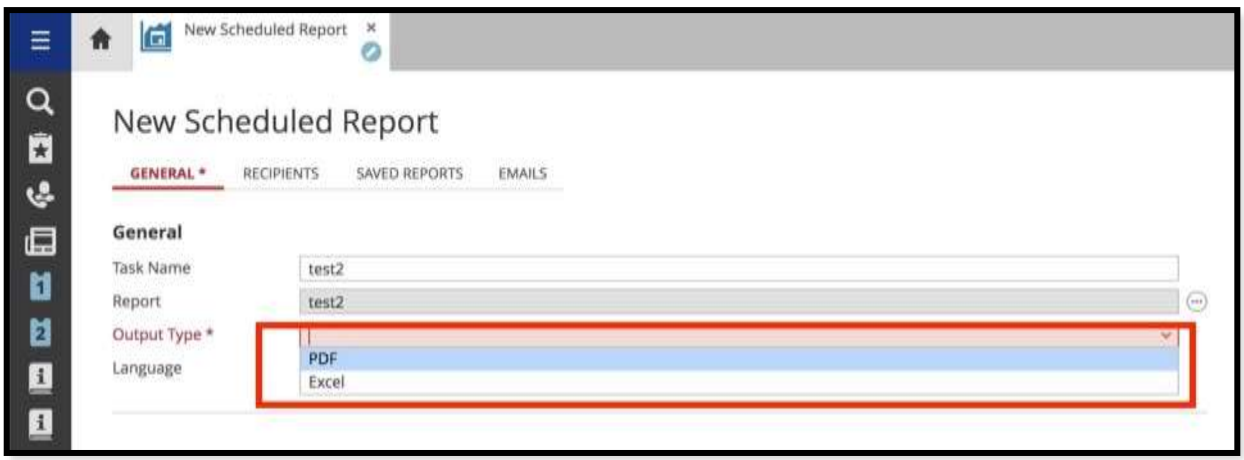
Scheduling a report will allow you to email a report in an Excel or PDF document.

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.

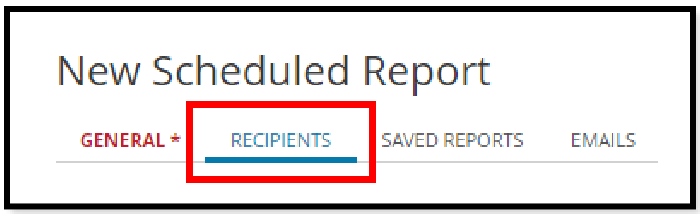
4. Choose who to send the report to. Under Execute, choose the radial button to send the report to a particular operator or yourself (recipient). ***Note:*** *Reports can be sent to anyone in the TOPdesk system who is an operator.*


New Scheduled Report
General
Execute

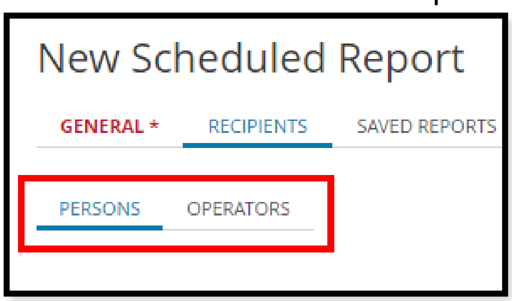
5. Choose the schedule for the emailed report where you will choose the interval and the run.

Under Recipients tab

1. Next, click on the Recipients tab.



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

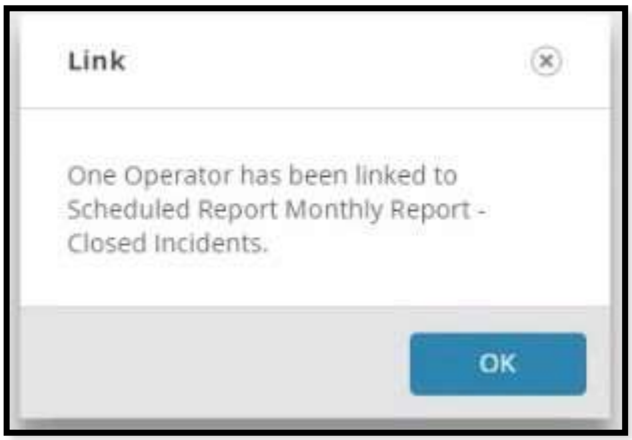


3. When choosing Operators, you can use the Links Wizard to choose who to send the report to.

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.

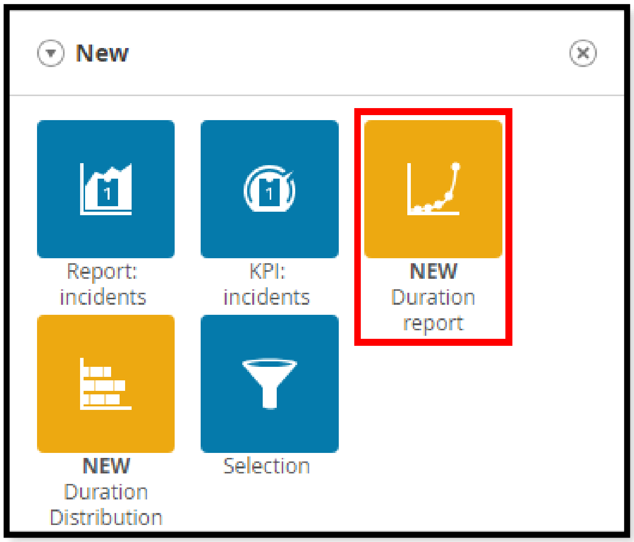
5. Click OK.



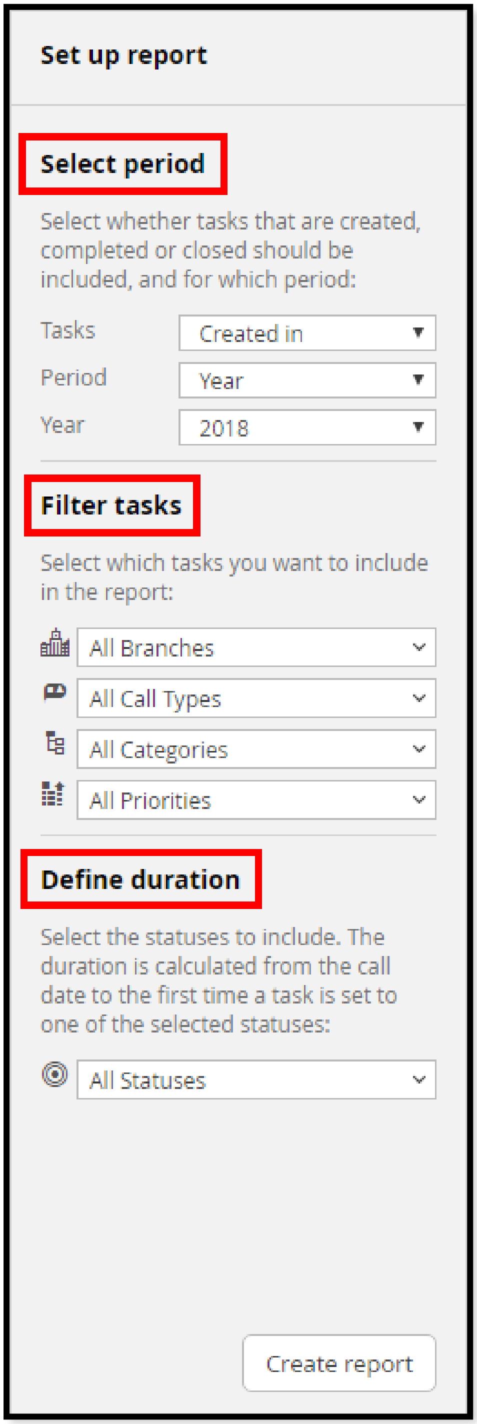
Creating a Duration Report

This version of TOPdesk also implements two new reports: 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 report's duration.



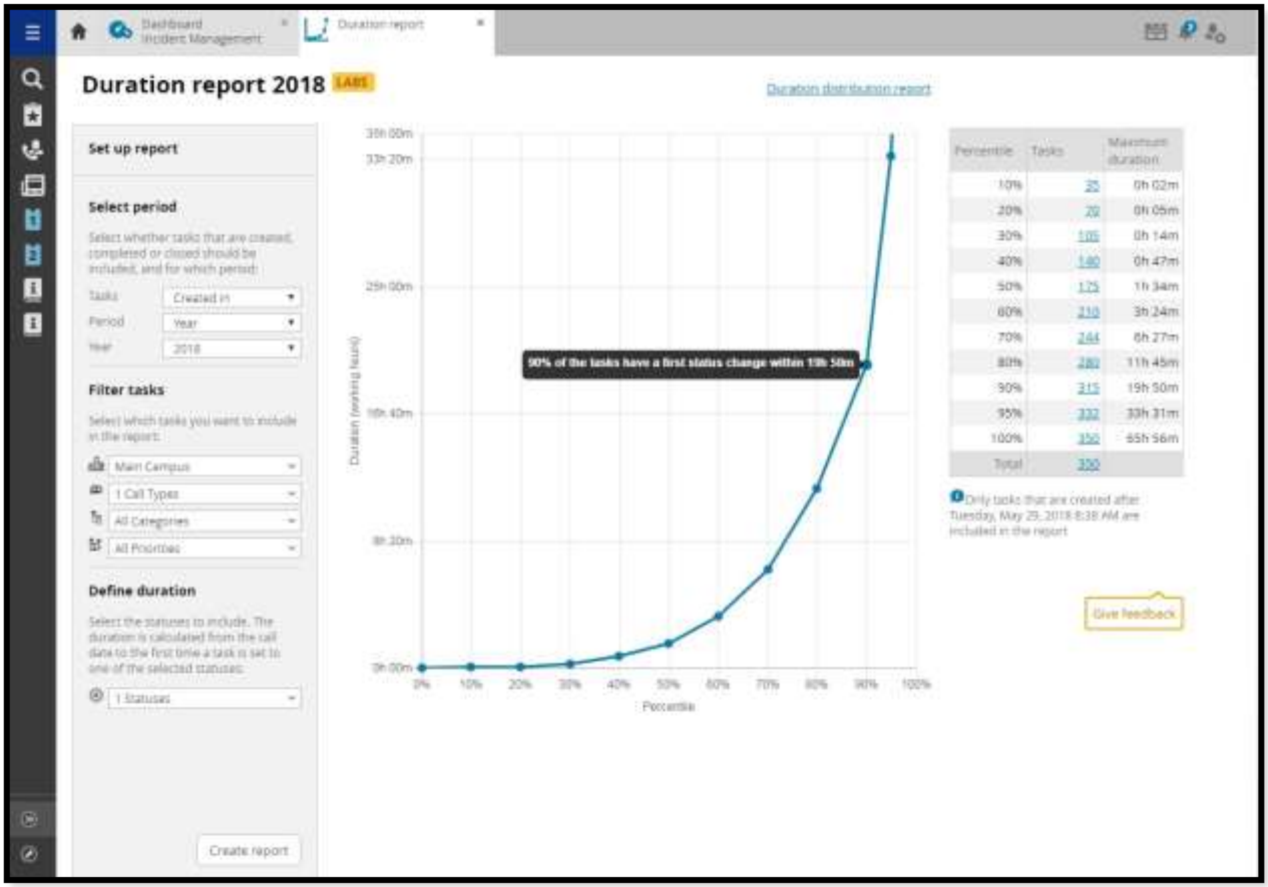
1. **Select Period**:
   - Tasks options are Created in, Completed in, and Closed in.
   - Period options are Year, Quarter, and Month.

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.



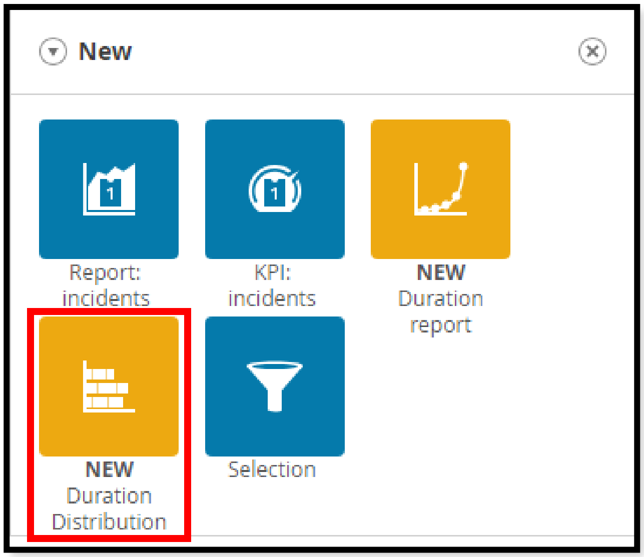
3. Click **Create Report**.
   You will see a report with the criterion you selected in a graph and in a table. You can drag your cursor over the results on the graph to display the corresponding information in the table.

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.

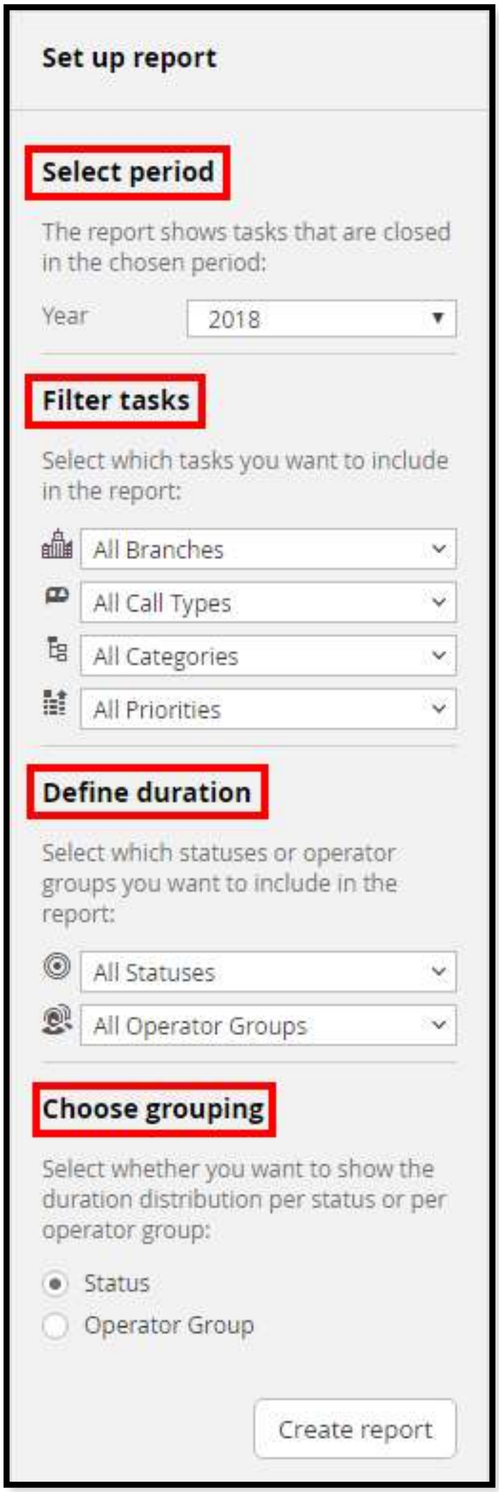
Note: *If you change the criterion, you will no longer see the report you previously created.*

Creating a Distribution Report

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



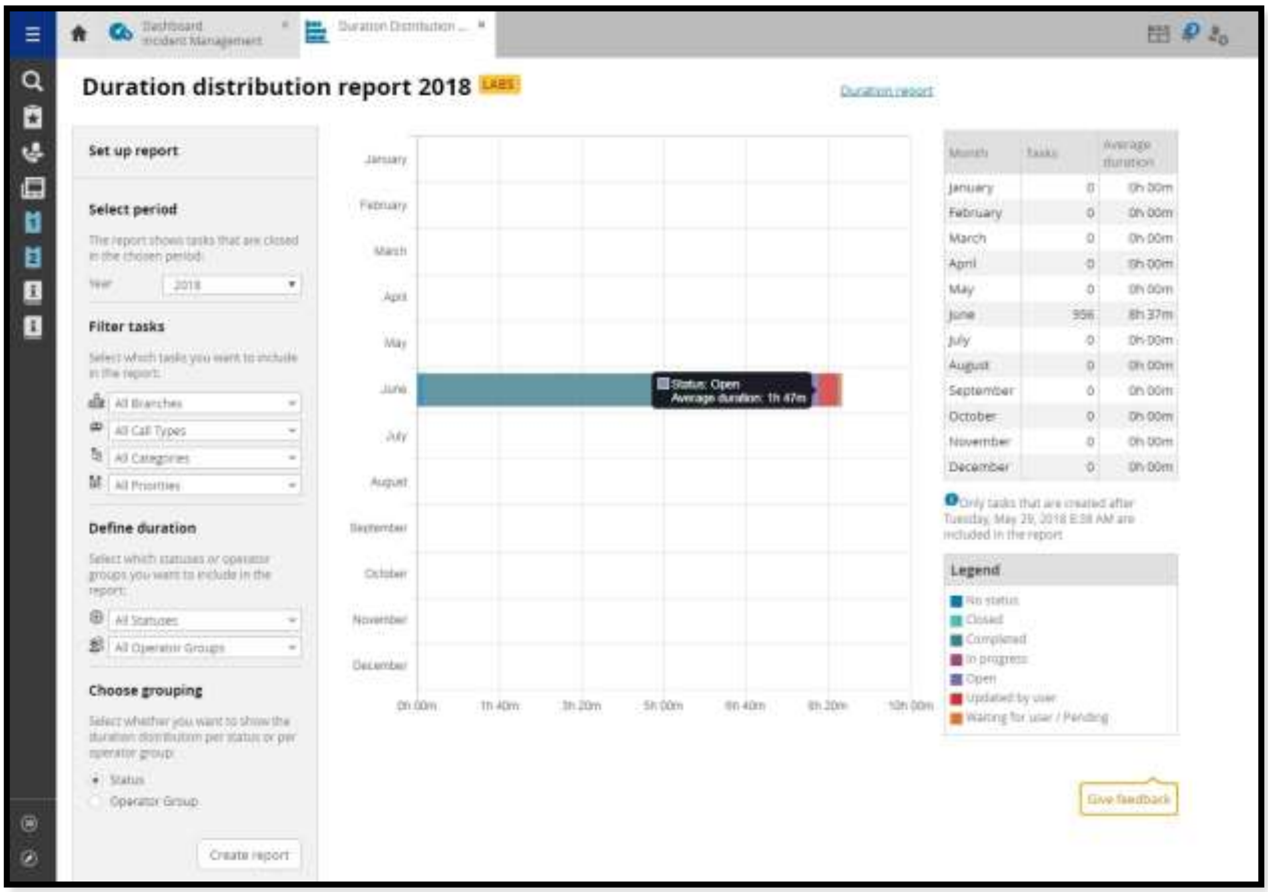
2. Here, you select the period, filter tasks, define duration, and choose the report's grouping (Status or Operator Group).



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.*

Locating Help Resources

umTech offers technical support and resources to faculty, staff, and students. Assistance can be found through any of the support services below:

Submitting a Service Request

Login URL: Click here to access our service desk ticketing system. After logging in, choose the appropriate form to request services.

Contact the ITS Service Desk — 901.678.8888 any day of the week! *(Excluding Some Holidays)*

ITS Service Desk Walk-In hours (Admin Building Room 100):
Monday – Friday 8:00 am – 4:30 pm

The ITS Service Desk Call Center hours:
Monday – Friday 8:00 am – 8:00 pm
Saturday 10:00 am – 2:00 pm
Sunday 1:00 pm – 5:00 pm

Contact the Service Desk for assistance with technical login problems or issues. Voicemail services will handle ALL incoming calls after hours. If you require assistance after 8:00 pm, please leave a message or submit a service request.

Voice messages will be checked regularly and will receive a priority response the following business day. You may also email umTech at umtech@memphis.edu. *(**Note:** Using this email will automatically generate a service request.)*

Important Links

Explore the umTech Website
Search the Solutions Page