

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

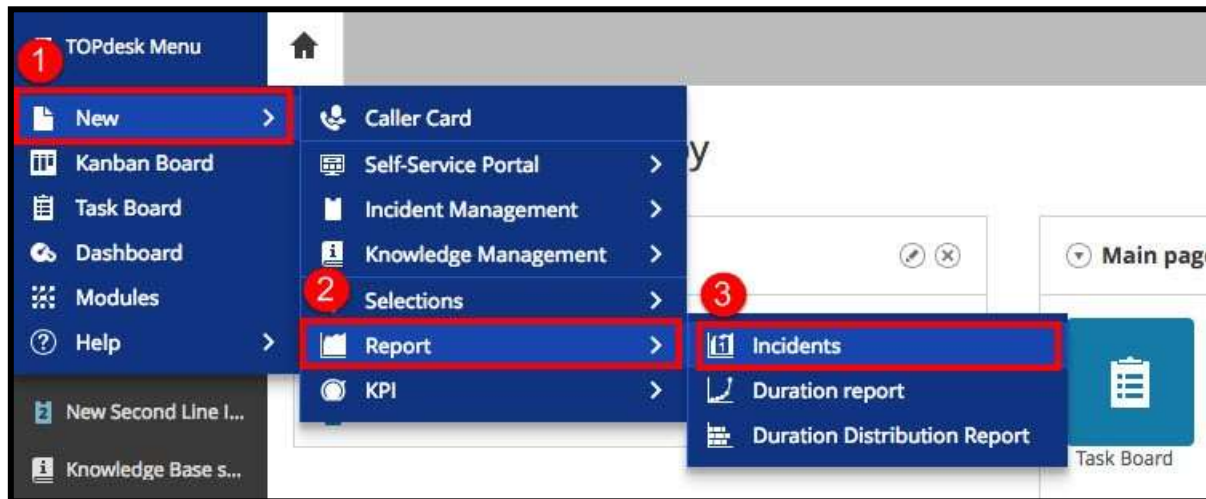
Getting Started

Creating Reports

There are two methods of creating reports.

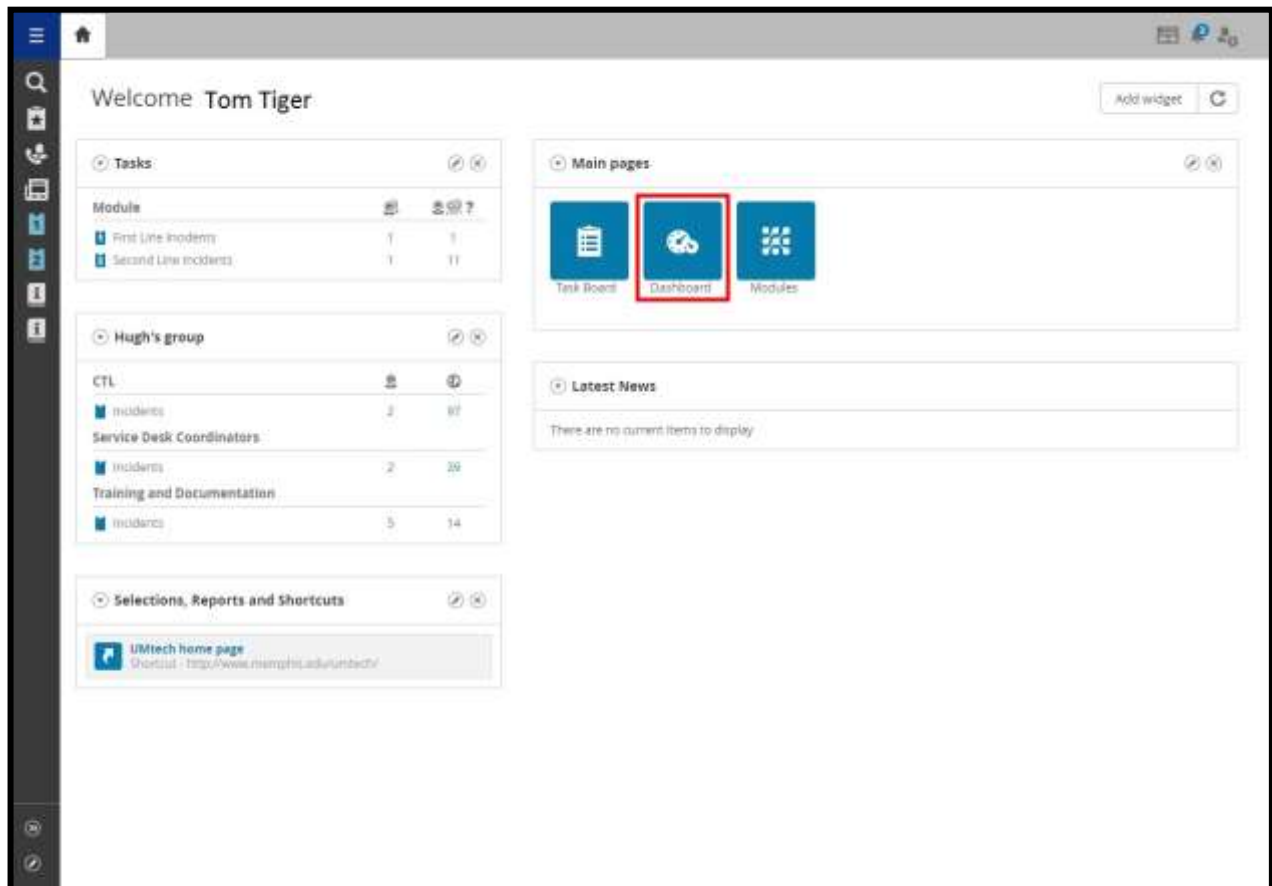
Method 1

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

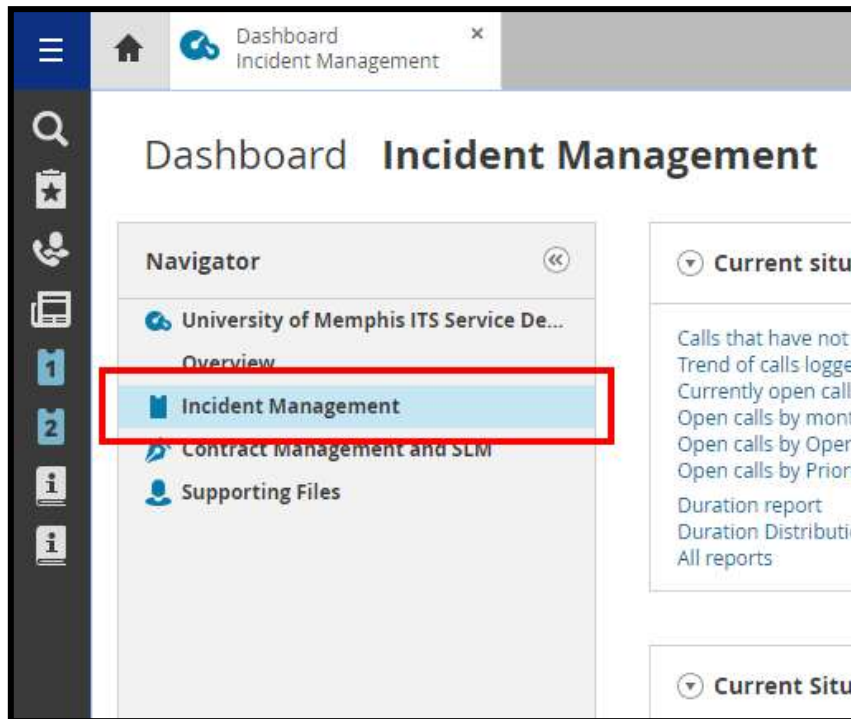


Method 2

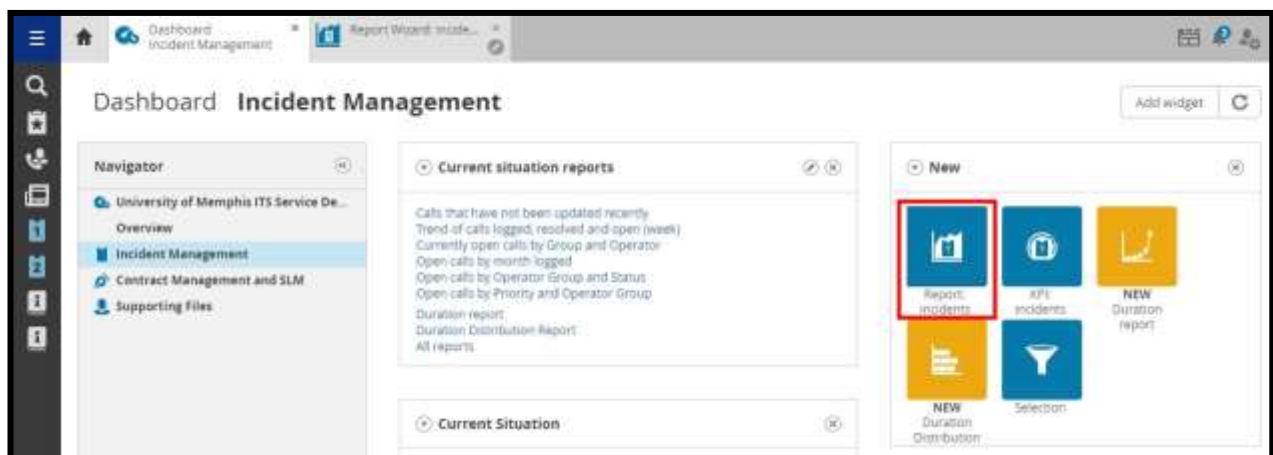
1. From main pages, select **Dashboard**.



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



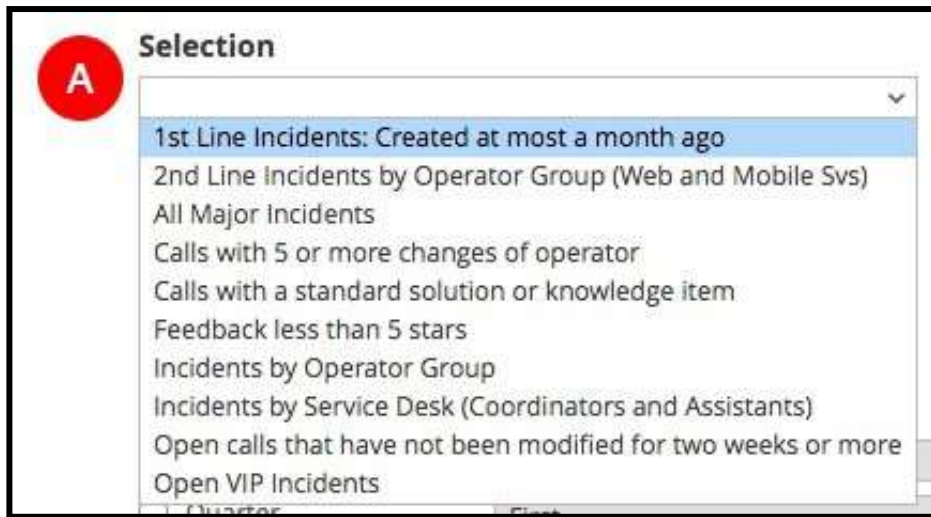
3. Select **Report: incidents**.



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.



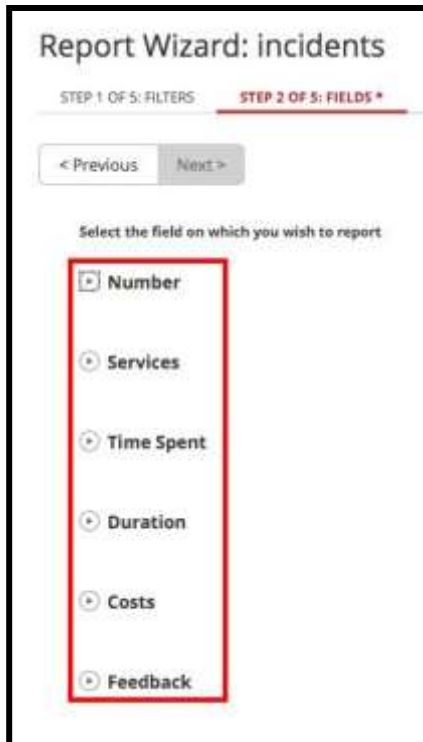
B. Options when choosing the B) Date Filter.

The screenshot shows the 'Date filter' section of a report wizard. It includes a red circle with the letter 'B' and a dropdown menu set to 'Date filter'. Below this, there is a radio button for 'Everything up to now'. The 'Absolute period' section has radio buttons for 'Year', 'Quarter', 'Month', 'Week', and 'Time span'. The 'Year' option is selected, and the date '2018' is entered. The 'Quarter' option is selected, and 'First' is chosen from a dropdown, with '2018' entered next to it. The 'Month' option is selected, and 'May' is chosen from a dropdown, with '2018' entered next to it. The 'Week' option is selected, and '21' is entered, with '2018' entered next to it. The 'Time span' option is selected, and 'from' and 'until' are entered, with 'June 2, 2018' entered next to 'until'. The 'Relative period (whole units)' section has radio buttons for 'Year', 'Quarter', 'Month', 'Week', and 'Time span'. The 'Year' option is selected, and 'year(s) ago' is entered. The 'Quarter' option is selected, and 'quarters ago' is entered. The 'Month' option is selected, and 'months ago' is entered. The 'Week' option is selected, and 'weeks ago' is entered. The 'Time span' option is selected, and 'from' and 'for' are entered, with 'ago' entered next to 'for'.

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

The screenshot shows the 'Report Wizard: incidents' screen. It has a progress bar with five steps: 'STEP 1 OF 5: FILTERS', 'STEP 2 OF 5: FIELDS', 'STEP 3 OF 5: GROUPS', 'STEP 4 OF 5: DISPLAY OPTIONS', and 'STEP 5 OF 5: RESULT'. The 'STEP 1 OF 5: FILTERS' step is highlighted. Below the progress bar, there are three buttons: '< Previous', 'Next >', and 'Preview'. The 'Next >' button is highlighted with a red box.

- 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.



Report Wizard: incidents

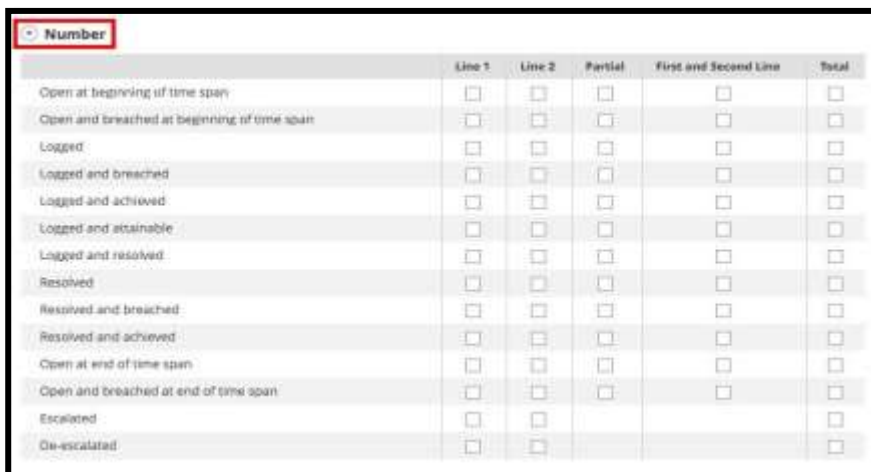
STEP 1 OF 5: FILTERS **STEP 2 OF 5: FIELDS ***

< Previous Next >

Select the field on which you wish to report

- ☒ **Number**
- ☐ Services
- ☐ Time Spent
- ☐ Duration
- ☐ Costs
- ☐ 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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open and breached at beginning of time span	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Logged	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Logged and breached	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Logged and achieved	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Logged and attainable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Logged and resolved	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Resolved	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Resolved and breached	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Resolved and achieved	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open at end of time span	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open and breached at end of time span	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Escalated	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>
De-escalated	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>

Services

	Line 1	Line 2	Partial	First and Second Line	Total
Open at beginning of period and SLA target date breached	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open at end of period and SLA target date breached	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Created in period and SLA target date not yet breached	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Created in period and SLA target date breached	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Resolved in period and SLA target date achieved	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Resolved in period and SLA target date breached	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Time Spent

	Line 1	Line 2	Partial	First and Second Line	Total
Time Spent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Average time spent:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>

Duration

	Line 1	Line 2	Partial	First and Second Line	Total
Total actual duration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Average actual duration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Maximum actual duration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Minimum actual duration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Total 'On hold' duration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Average 'On hold' duration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Maximum 'On hold' duration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Minimum 'On hold' duration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Total adjusted duration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Average adjusted duration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Maximum adjusted duration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Minimum adjusted duration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Total 'Resolved' duration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Average 'Resolved' duration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Maximum 'Resolved' duration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Minimum 'Resolved' duration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Total 'In progress' duration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Average 'In progress' duration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Maximum 'In progress' duration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Minimum 'In progress' duration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>

☒ **Costs**

	Line 1	Line 2	Partial	First and Second Line	Total
Costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Average Costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Maximum Costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Minimum Costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Total Costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>

☒ **Feedback**

	Line 1	Line 2	Partial	First and Second Line	Total
Feedback rating	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>
Average feedback rating	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>

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.

☒ **Group 1**

Group by:

☐ Do not use
☐ Field
☒ Time span
☐ Percentile

Field:
 Card type:

Sort by:

☒ Default order
☐ Alphabetical
☐ By value

Field:
 Card type:

☒ Ascending

☒ **Group 2**

Group by:

☐ Do not use
☒ Field
☐ Time span
☐ Percentile

Field:
 Card type:

Sort by:

☐ Default order
☐ Alphabetical
☒ By value

Field:
 Card type:

☒ Ascending

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.

Report Wizard: incidents

STEP 1 OF 5: FILTERS
STEP 2 OF 5: FIELDS
STEP 3 OF 5: GROUPS
STEP 4 OF 5: DISPLAY OPTIONS
STEP 5 OF 5: RESULT

< Previous

Next >

Preview

Choose how you want to display the report.

Table

Category	Total
Network hardware	22
Desktop hardware	22
Workstation hardware	11
Printer	11
Software licenses	2
Hardware accessories	2
Mobile devices	2
Mobile accessories	2
Total	133


Table with details

Category	Total
Network hardware	22
Printer	11
Bekebeling	2
Telephone centrale	2
Server	2
Hub	2
Wall outlet	1
Total - Network hardware	22

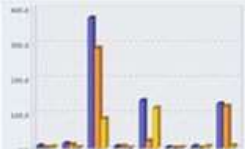
Dynamic table

Category	Total
Network hardware	22
Printer	11
Bekebeling	2
Telephone centrale	2
Server	2
Hub	2
Wall outlet	1
Total - Network hardware	22


Pie chart



Bar chart

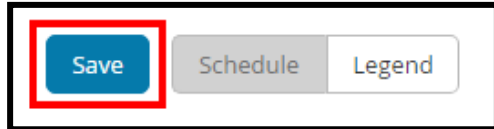


Line graph



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)

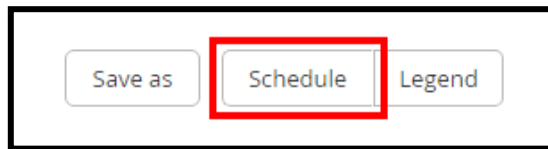


Scheduling a Report

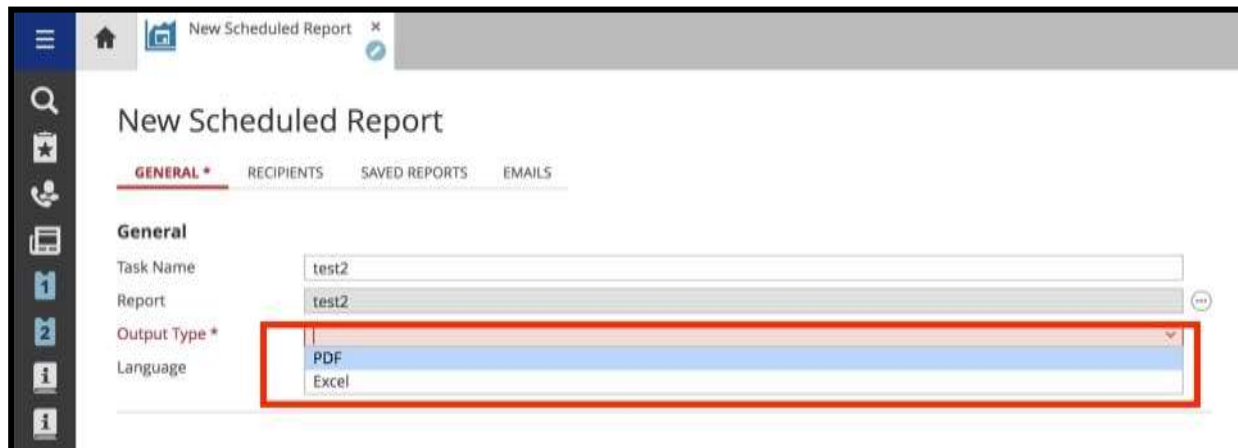
Scheduling a report will allow you to email a report in an Excel or PDF document.

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 | RECENTLY | SAVED REPORTS

General

Task Name:

Report:

Output Type:

Language:

Execute

Execute report using the authorization of:

☐ In particular operation:

☐ On the system:

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



Schedule

is Active ☒

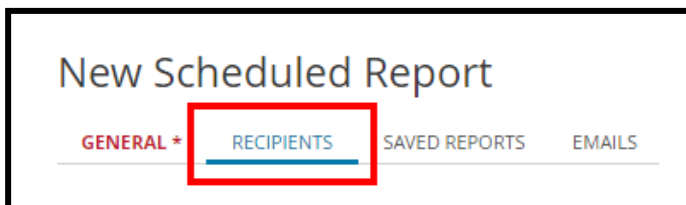
Interval Week

Next Run May 31, 2018 10:43 AM

Run now

Under Recipients tab

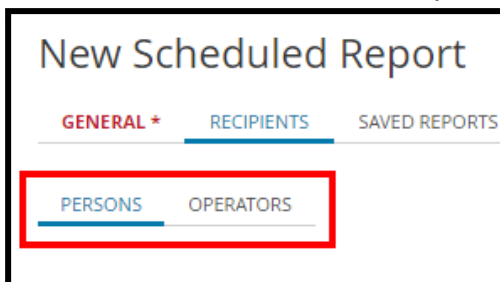
1. Next, click on the Recipients tab.



New Scheduled Report

GENERAL * RECIPIENTS SAVED REPORTS EMAILS

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



New Scheduled Report

GENERAL * RECIPIENTS SAVED REPORTS

PERSONS OPERATORS

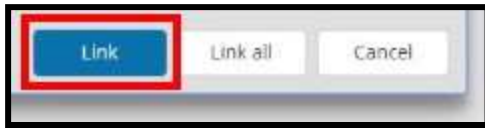
3. When choosing Operators, you can use the Links Wizard to choose who to send the report to.



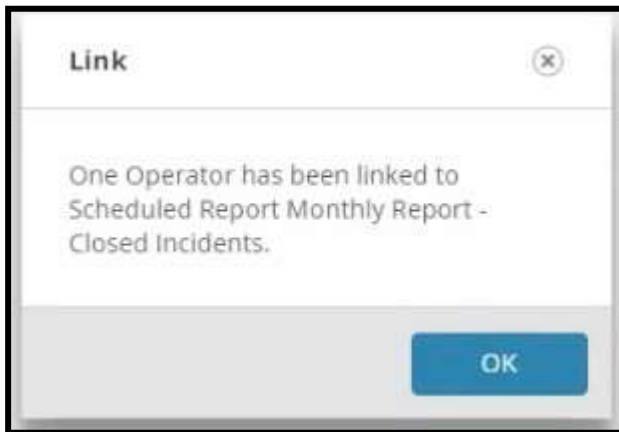
Links Wizard   

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

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.



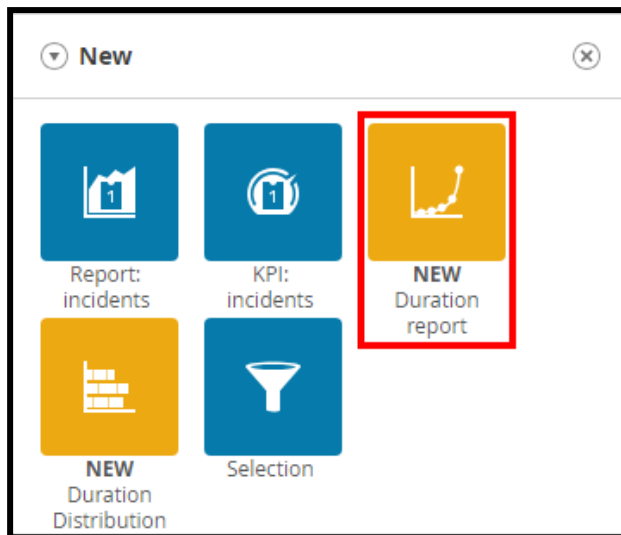
5. Click OK.



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.

Set up report

Select period

Select whether tasks that are created, completed or closed should be included, and for which period:

Tasks

Created in

Period

Year

Year

2018

Filter tasks

Select which tasks you want to include in the report:

All Branches

All Call Types

All Categories

All Priorities

Define duration

Select the statuses to include. The duration is calculated from the call date to the first time a task is set to one of the selected statuses:

All Statuses

Create 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.

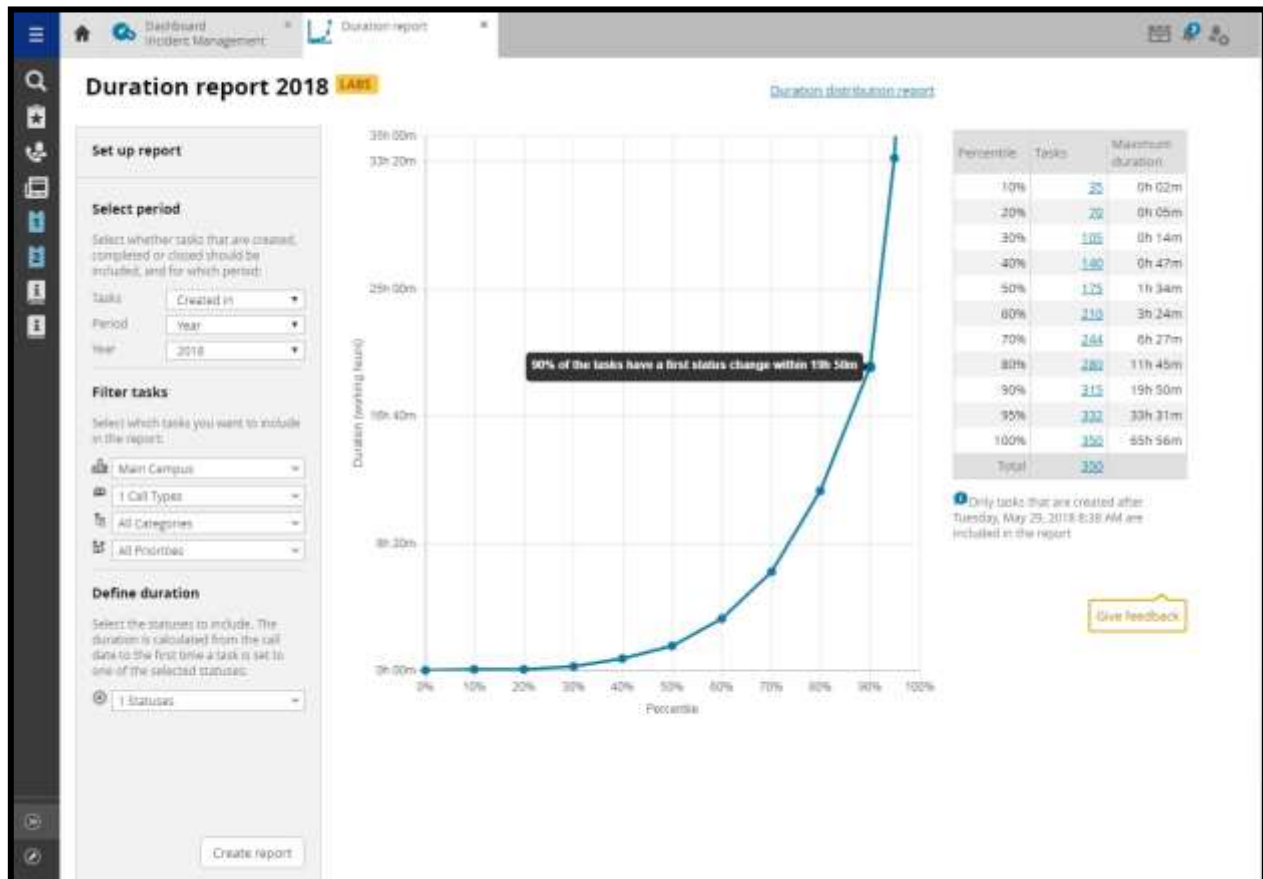
- ☐ Year options are the last two years.

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.

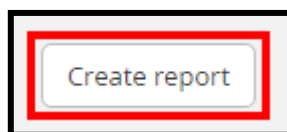
3. Define Duration:

- ☐ 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.

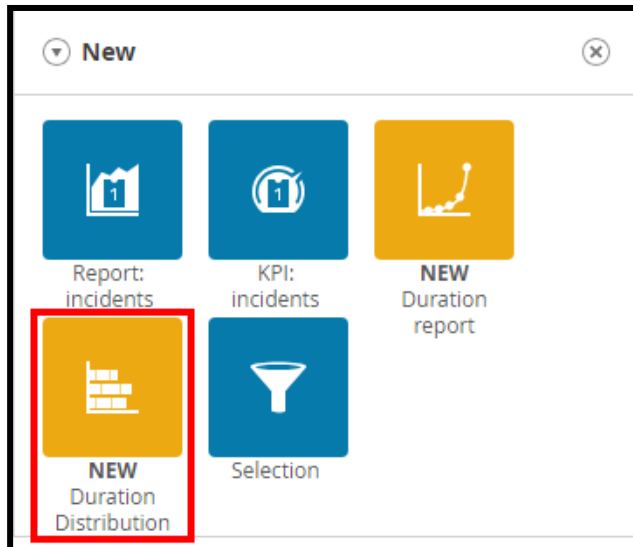


4. From here, you can change the selections you made. If you change the criterion, click Create Report again and you will see a report with the updated information.

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.



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

Set up report

Select period

The report shows tasks that are closed in the chosen period:

Year

Filter tasks

Select which tasks you want to include in the report:

Define duration

Select which statuses or operator groups you want to include in the report:

Choose grouping

Select whether you want to show the duration distribution per status or per operator group:

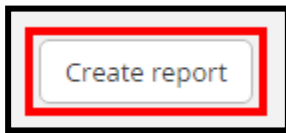
☒ Status

☐ Operator Group

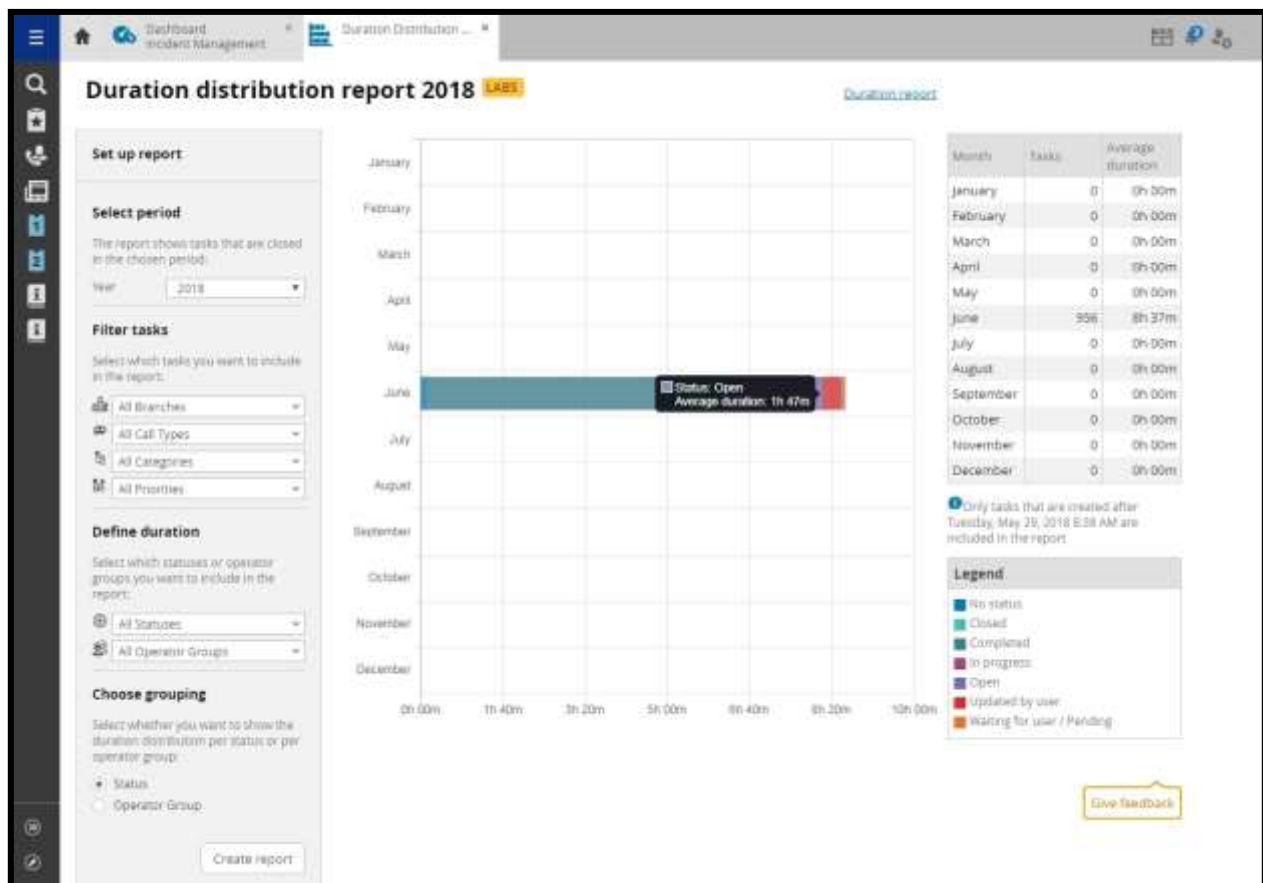
Create report

- Select Period:
 - ☐ Year options are the last two years.
- 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.
- Define Duration:
 - ☐ Statuses options are the same as Incident status options.
 - ☐ Operator Groups options are the same as Incident Operator Groups.
- 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](#)