

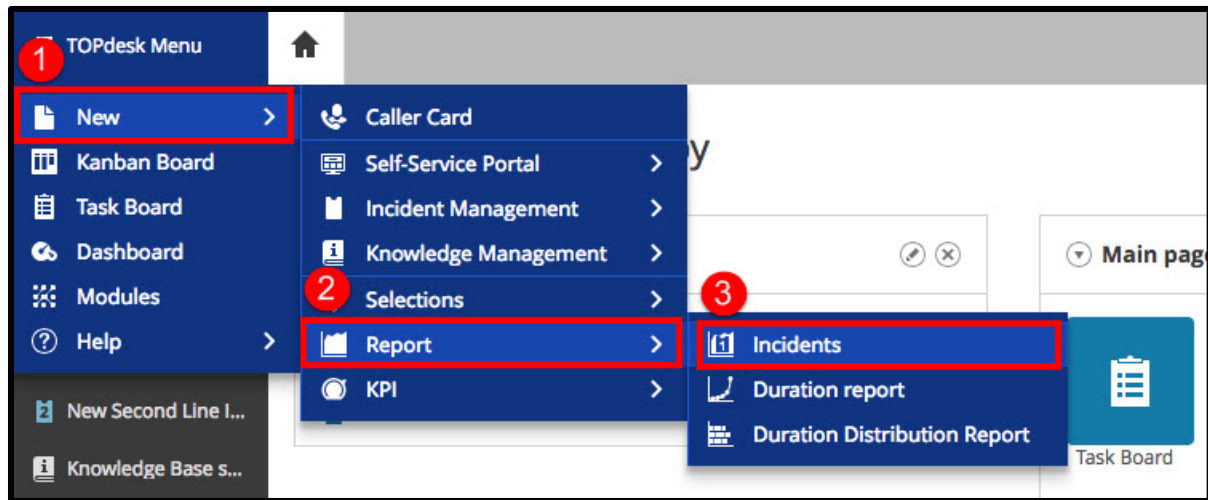
Getting Started

Creating Reports

There are two methods of creating reports.

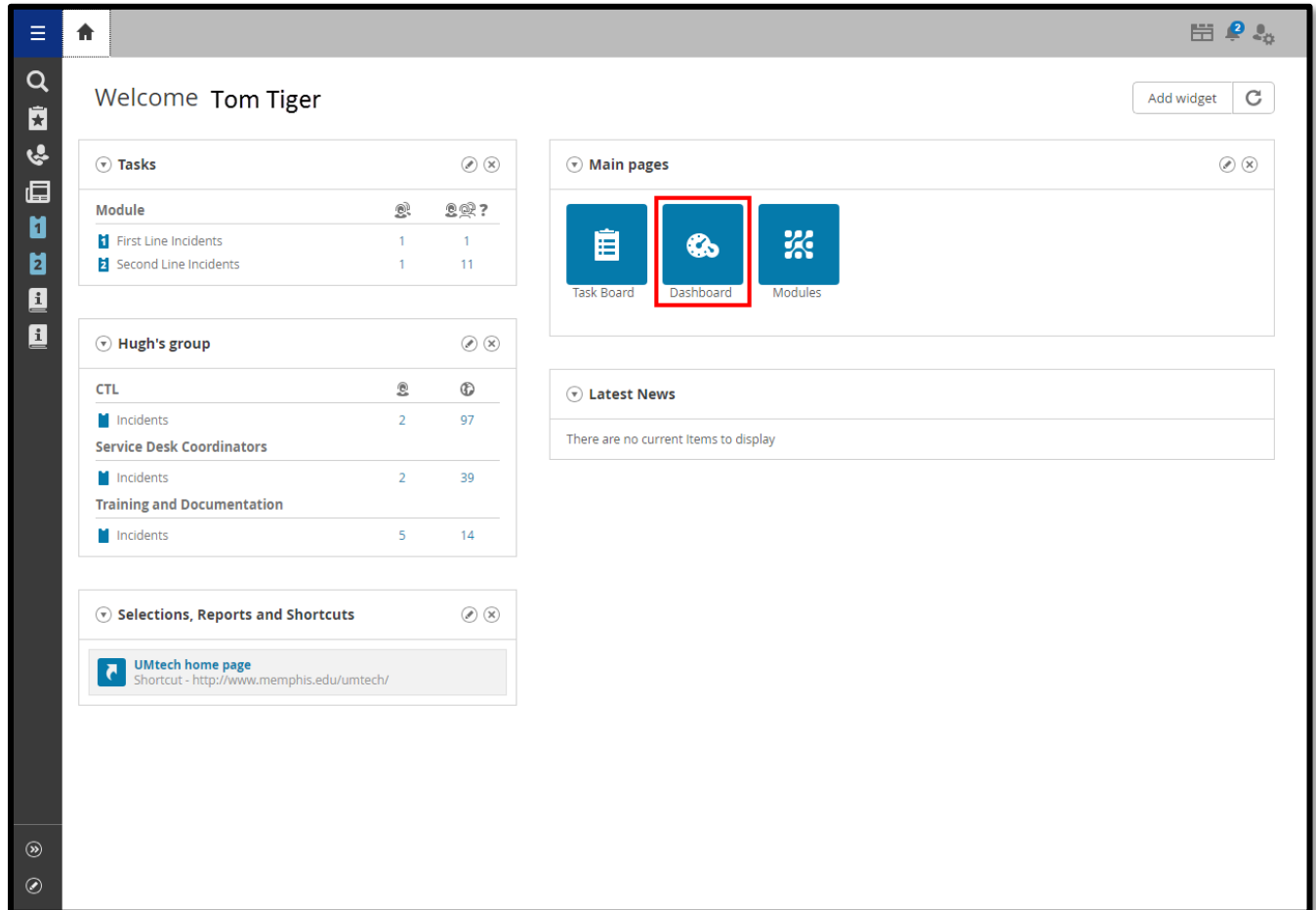
Method 1

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



Method 2

1. From main pages, select Dashboard.



Welcome Tom Tiger

Add widget

Tasks

Module		
1 First Line Incidents	1	1
2 Second Line Incidents	1	11

Hugh's group

CTL		
Incidents	2	97
Service Desk Coordinators		
Incidents	2	39
Training and Documentation		
Incidents	5	14

Selections, Reports and Shortcuts

UMtech home page
Shortcut - <http://www.memphis.edu/umtech/>

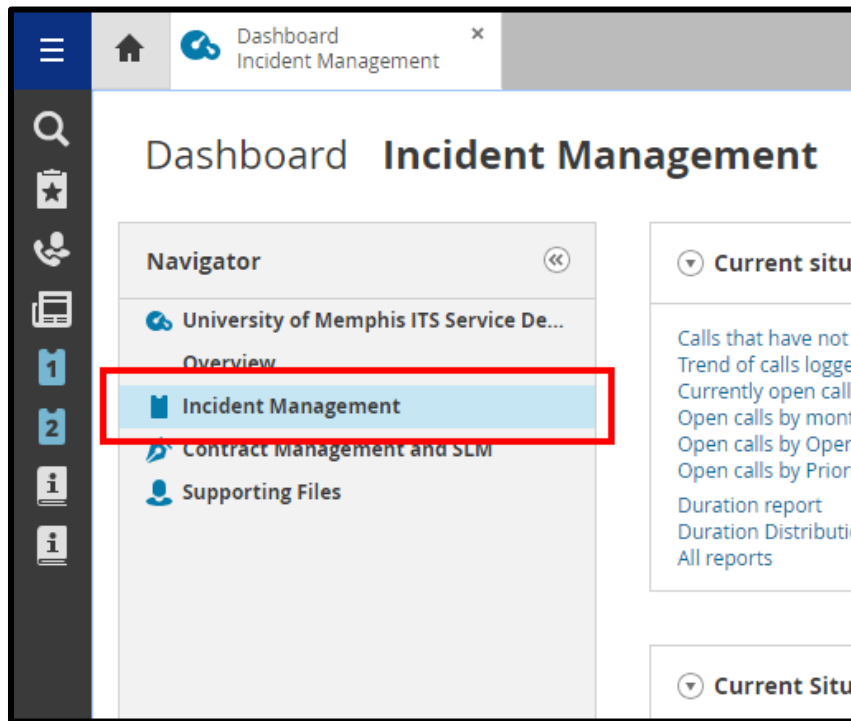
Main pages

Task Board Dashboard Modules

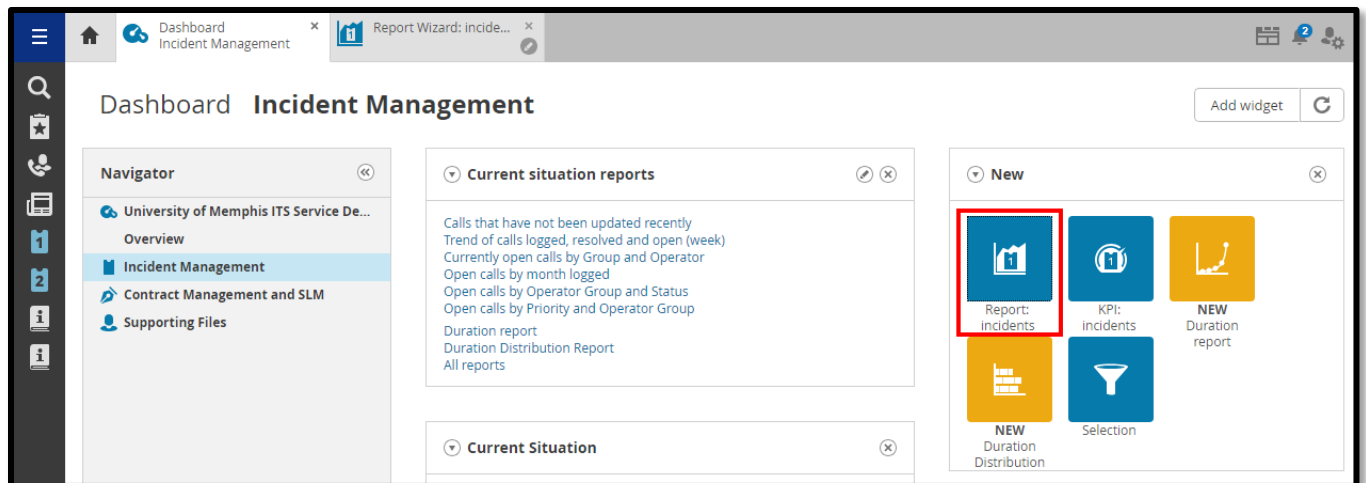
Latest News

There are no current items to display

2. From the Navigator, select Incident Management.



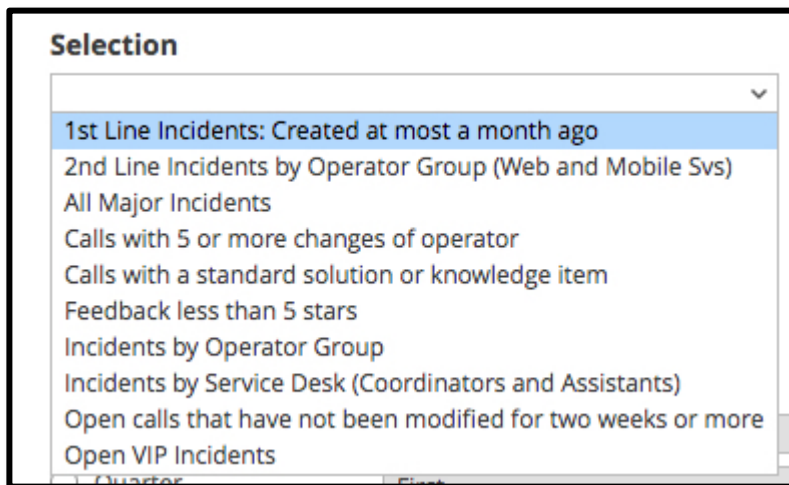
3. Select Report: incidents.



This will open the Report Wizard. There are 5 steps involved when using the Report Wizard.



4. Once opened, the Report Wizard automatically takes you to Step 1 of 5: Filters to:
 - a. Choose from built in selections or



b. Choose the Date Filter.

Date filter

Everything up to now

Absolute period

Year

Quarter

Month

Week

Time span from until

Relative period (whole units)

Year year(s) ago

Quarter quarters ago

Month months ago

Week weeks ago

Time span from ago
for

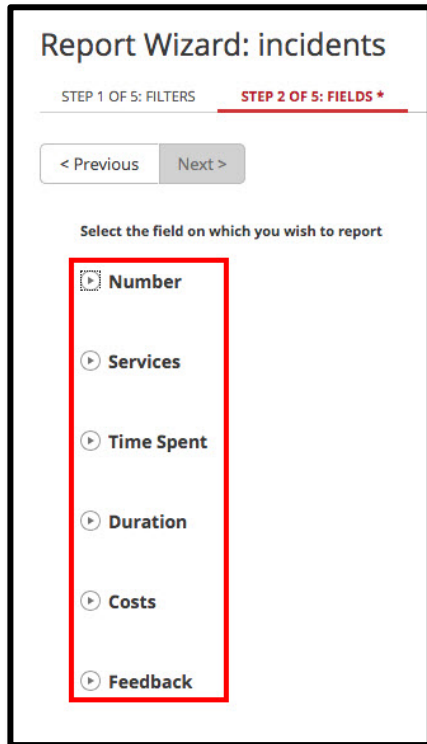
After you make your selection, click Next.

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

- 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

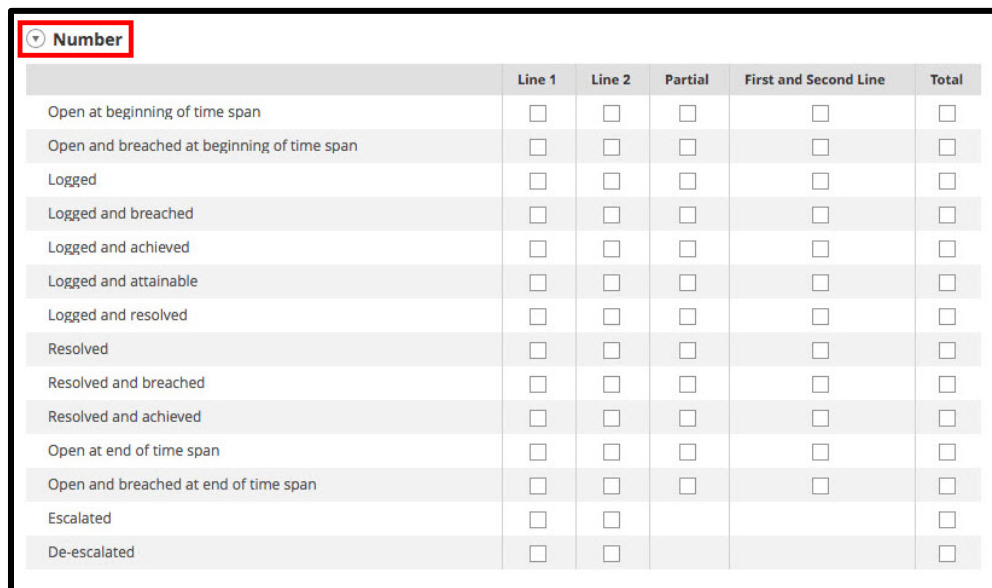
STEP 1 OF 5: FILTERS **STEP 2 OF 5: FIELDS ***

< 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"/>

Make your selections and click **Next**.

- In **Step 3 of 5: Groups**, choose the groups to filter in Group 1, Group 2, and Group 3.

Note: For each group you can also choose how the data is sorted.

Choose 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

7. 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.

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
Central facilities	22
Network hardware	20
Colleges	14
Software applications	9
Software applications	7
Software applications	5
Total	103

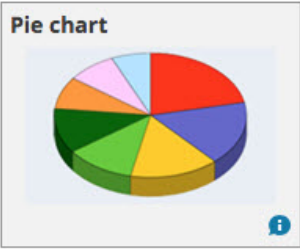
Table with details

Category	Total
Network hardware	
Printer	19
Bekabeling	4
Telefoon centrale	8
Server	3
Hub	1
Wall outlet	1
Total - Network hardware	32


Dynamic table

Category	Total
Logged	
Network hardware	
Subcategory	Total
Logged	
Printer	19
Bekabeling	4


Pie chart



Bar chart



Line graph



8. 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)

Save
Schedule
Legend