

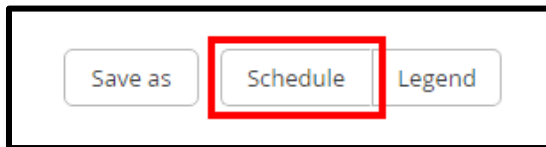
## Scheduling a Report

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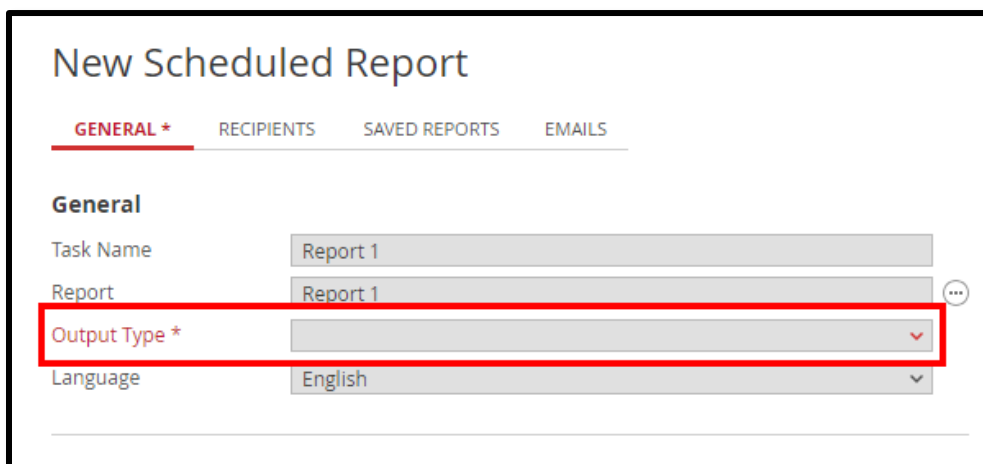
Scheduling a report will allow you to email a report in an Excel or PDF document.

### Under the General tab

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

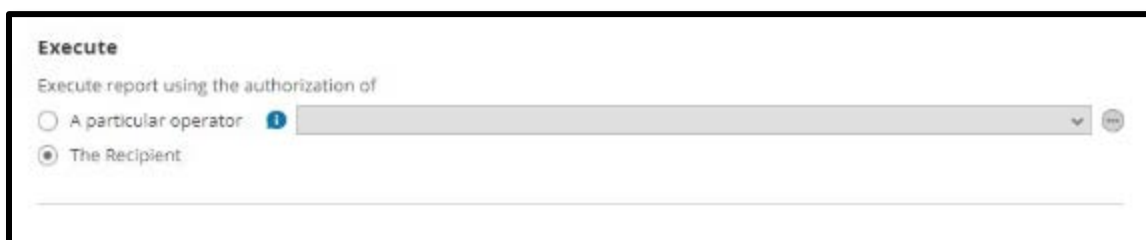


2. Choose output type (Excel or pdf).



A screenshot of the "New Scheduled Report" form. The form has four tabs: "GENERAL \*", "RECIPIENTS", "SAVED REPORTS", and "EMAILS". The "GENERAL \*" tab is selected. Under the "General" section, there are four fields: "Task Name" (Report 1), "Report" (Report 1), "Output Type \*" (highlighted with a red box), and "Language" (English). The "Output Type \*" field is a dropdown menu.

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.



A screenshot of the "Execute" section of the form. It says "Execute report using the authorization of" followed by a dropdown menu. There are two radio buttons: "A particular operator" (unselected) and "The Recipient" (selected). The "The Recipient" radio button is highlighted with a red circle.

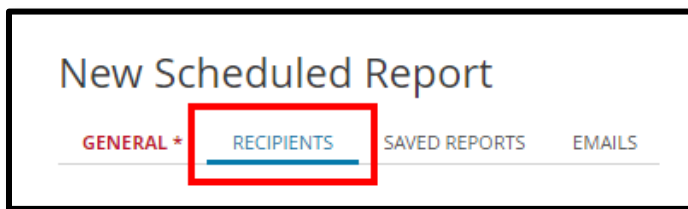
5. Choose the schedule for the emailed report where you will choose the interval and the run.



The screenshot shows a 'Schedule' configuration panel. It includes a checkbox for 'Is Active' which is checked. Below it is a dropdown menu for 'Interval' set to 'Week'. The 'Next Run' field shows 'May 31, 2018' at '10:43 AM'. A 'Run now' button is located at the bottom left of the panel.

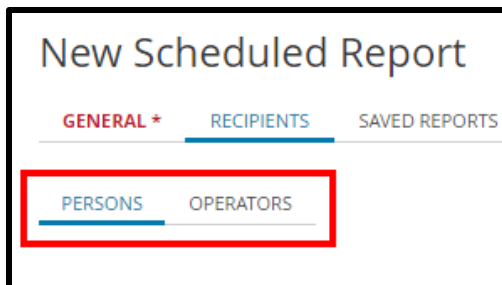
### Under Recipients tab

1. Next, click on the Recipients tab.



The screenshot shows the 'New Scheduled Report' page. At the top, there are four tabs: 'GENERAL \*', 'RECIPIENTS', 'SAVED REPORTS', and 'EMAILS'. The 'RECIPIENTS' tab is highlighted with a red box.

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



The screenshot shows the 'New Scheduled Report' page with the 'RECIPIENTS' tab selected. Below it, there are two sub-tabs: 'PERSONS' and 'OPERATORS'. Both sub-tabs are highlighted with a red box.

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



The screenshot shows a row of buttons. The first button, labeled 'Links Wizard', is highlighted with a red box. To its right are buttons for 'Refresh', 'More', and 'Settings'.

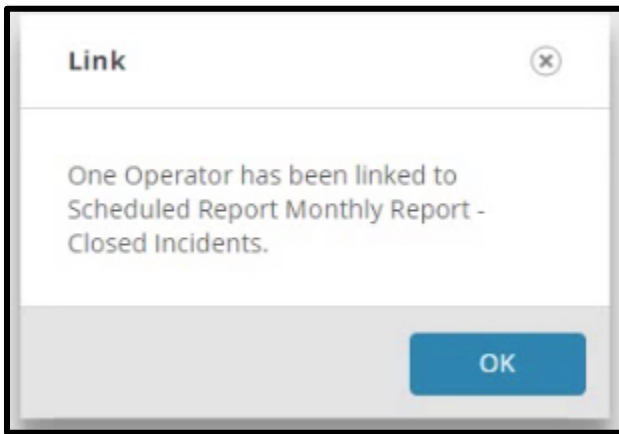
*Note: The Links Wizard allows you to search the system for the operator you wish to send the report to.*

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.

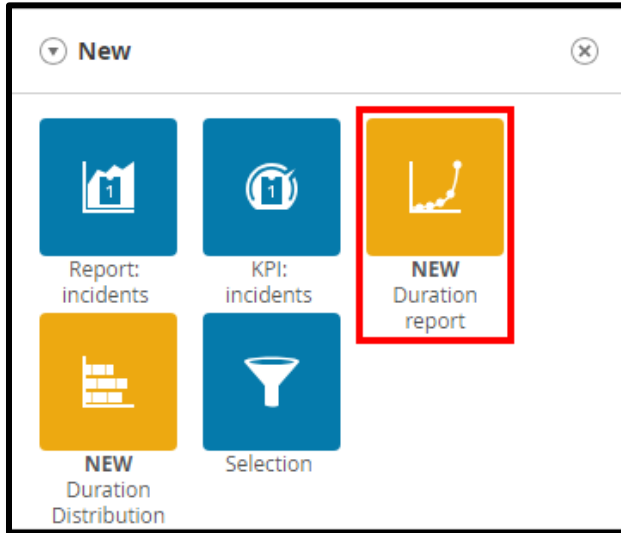
5. Click **OK**.



## Creating a Duration Report

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.

### Set up report

#### Select period

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

Tasks

Period

Year

#### Filter tasks

Select which tasks you want to include in the report:

#### 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:

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.

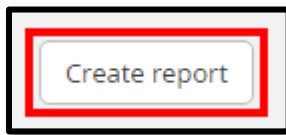
2. Filter tasks:

- 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.

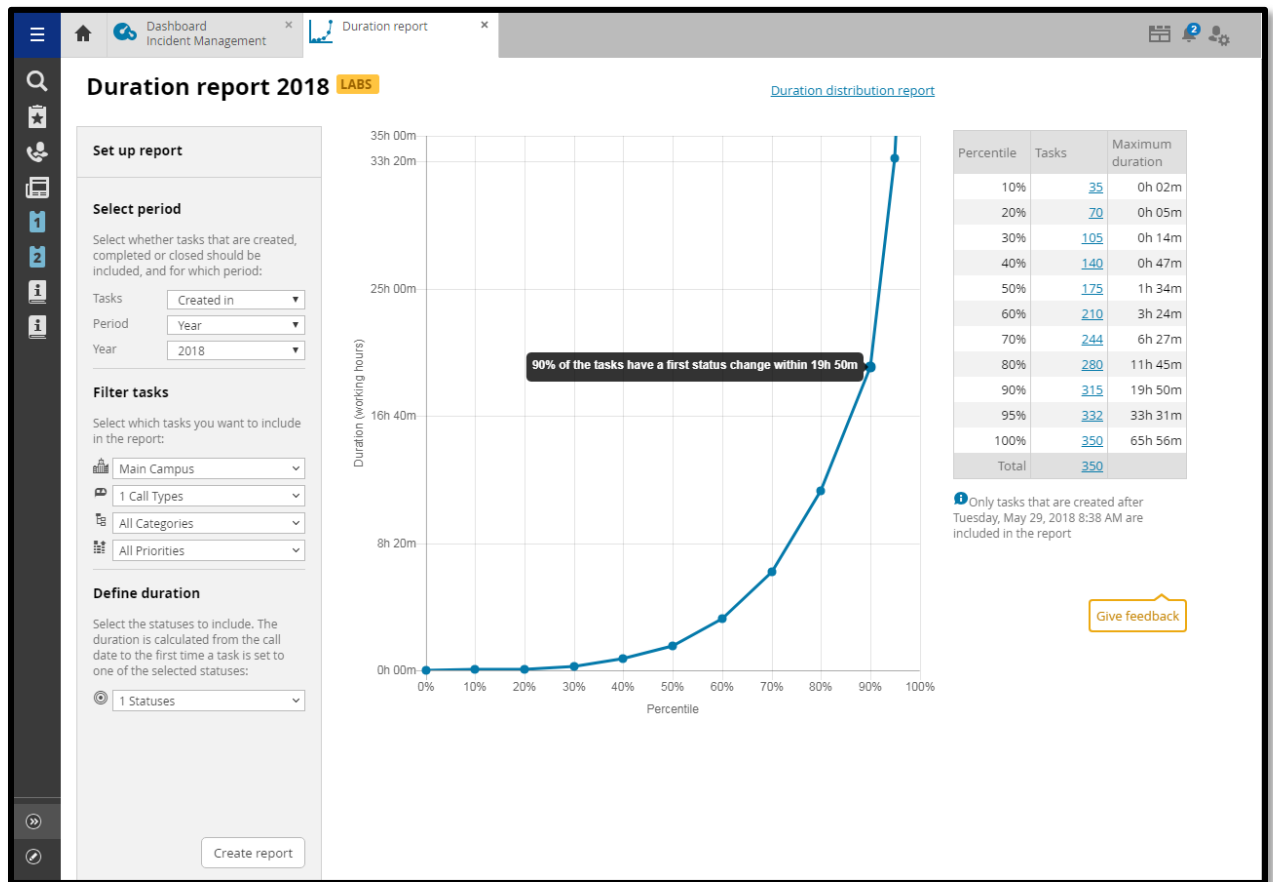
3. Define Duration:

- 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.

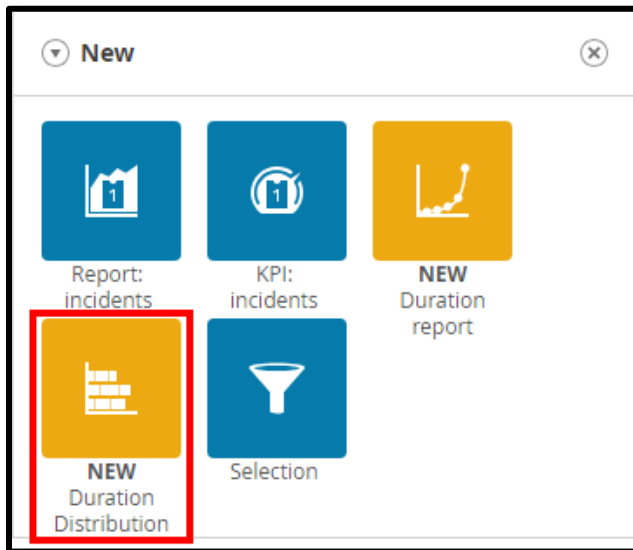


4. From here, you can change the selections you made. If you change the criterion, click Create Report again and you will see a report with the updated information.

*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.

### 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:

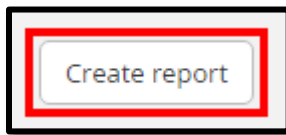
Status

Operator Group

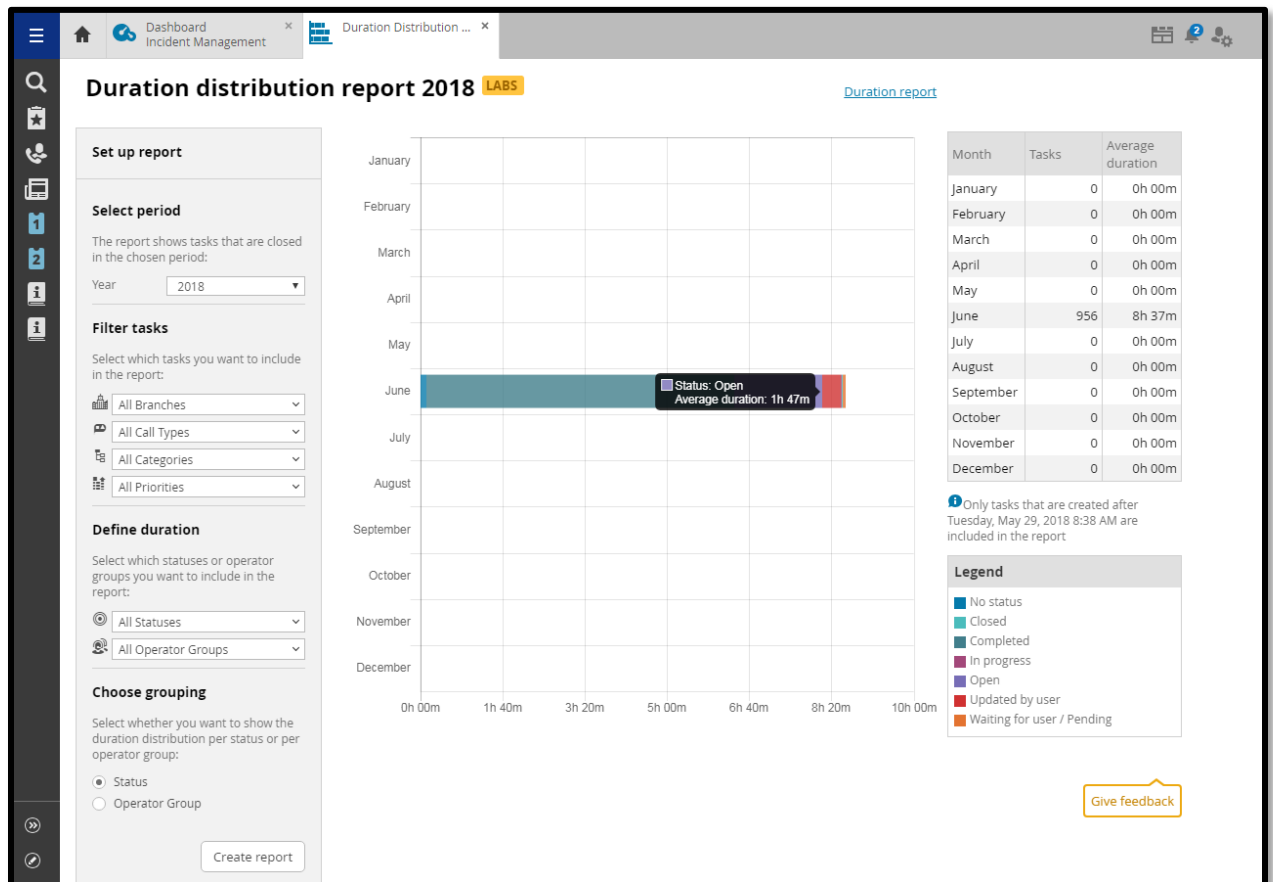
1. Select Period:
  - Year options are the last two years.
2. Filter Tasks:
  - **Branches** options are the UofM campuses.
  - **Call Types** options are Issue, Request, and Question.
  - **Categories** options are the same as Incident categories.
  - **Priorities** options are Critical, High, Medium, 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.*