

TOPdesk Report Training

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Selections

Selections are queries derived from the data contained in TOPdesk, these queries can be saved to be run again at a later point.

Name	Type	Role	Creator of the ca	Date/time of creatio
<input type="checkbox"/> Awaiting Service Desk confirmation	Role	IM First line	Admin	03 June 2010 11:29
<input type="checkbox"/> Creator but not current operator	Global		Admin	30 August 2010 14:
<input type="checkbox"/> Incidents at least 1 hour overdue	Role	IM First line	Admin	10 June 2010 12:01
<input type="checkbox"/> User response received	Role	IM First line	Admin	03 June 2010 11:29

A selection builds an SQL query in the back ground. When you create a **new selection** you will see the option to click **that** and this will shows all options.

Selection

Select all Incidents **that...**

Order by

Choose an order [v] ascending

Choose an order [v] ascending

Use selection Save as

A user can select on: **Fields** and **Links**. Fields are characteristics on the record we are selecting on, for example a field value, or a specific caller or category. Using a **Link** will create a selection on a characteristic of an associated record, for example in a selection on incidents that have a link to an operator group that has a specific characteristic.

Selection

Select all Incidents *that...*

Back

Select on fields

Links

Choose from the fields

Caller

- labi Caller
- ▼ Caller (registered)
- labi City (Caller)
- ▼ College/Support Group (Caller)
- ▼ Gender of the caller
- ▼ Location
- ▼ School / Division (Caller)
- labi Telephone number (Caller)

Card data

- ▼ Changer of the card
- ▼ Creator of the card








Important

- 🕒 Call date
- labi College/Support Group
- labi Incident number
- 123 Sequence number

Info

- 🕒 Actual duration
- Is major incident
- ▼ Major incident
- 🕒 Total expenses
- 🕒 Total time

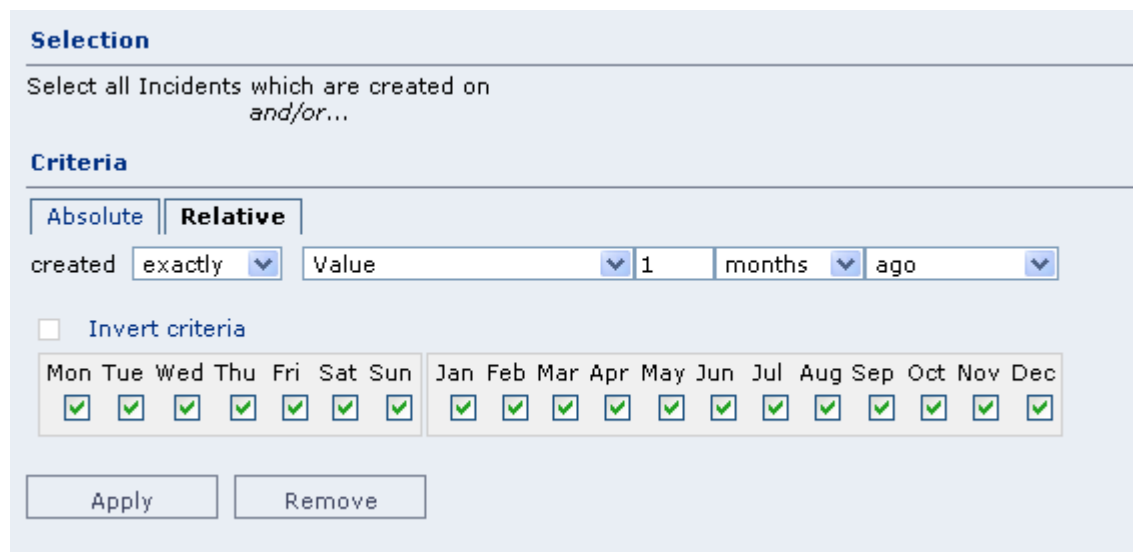
When selecting on fields there are several different **types of field** that can be selected and they will have their own characteristics in the selections, each type is indicated with its own **icon**:

-  Text
-  Search list
-  Date/time
-  Check box
-  Number
-  Time
-  Currency

Text selection criteria allow for values such as **contains**, **starts with** or **equals** as a specific worth.

Search lists allow **contains**, **starts with** or **equals** as a specific value and furthermore a **greater / smaller than** option. Greater or smaller is determined by the sorting order and what is most logical with regards to impact or priority search lists.

Date/time selections allow **on**, **before**, **after** or **between** specific date/times. It also distinguishes between an **absolute** and a **relative** time. An absolute time will reference a specific date and time, when this selection is run it will use that hard coded date and time. A relative time will reference a time determined by the time the selection was run, for example every incident that was logged a month ago. It will always return the values corresponding to one month before the current month.



The screenshot shows a web-based selection criteria interface. At the top, it says "Selection" and "Select all Incidents which are created on and/or...". Below this is a "Criteria" section with two tabs: "Absolute" and "Relative". The "Relative" tab is selected. The criteria is set to "created" with the operator "exactly", a "Value" field containing "1", and the unit "months ago". There is an "Invert criteria" checkbox which is unchecked. Below the criteria is a calendar grid with days of the week (Mon-Sun) and months (Jan-Dec). Each cell in the grid contains a green checkmark, indicating that all dates are selected. At the bottom of the interface are "Apply" and "Remove" buttons.

Check box selections are very simple since there can only ever be two values, either it has a value or it doesn't.

Number, **Time** and **Currency** selections can be based on **equal to**, **less than**, **greater than** or **between** values.

Selection

Select all Incidents which have a Total expenses equal to
and/or...

Criteria

Total expenses equal to pounds

Invert criteria

For each type of selection criteria you can also set the **negative** version of it. For example instead of 'all incidents that have a category equal to XYZ' you could define 'all incidents that do not have a category equal to XYZ', this is defined when setting up a criteria by ticking the **invert criteria** tick box.

For most criteria, instead of defining a **value** you can also select **empty** and **ask during selection use**. **Empty** is used to select everything where a specific field does not contain any value. **Ask during selection use** is used for saved selections, for example having a selection on a specific department would require a separate selection for each single department. If you set it to ask during selection it will suffice to make a single selection and every time you run it, you can enter what department you are interested in at that particular time.

To add multiple criteria to a selection you can press the **and** or the **or** links.

Selection

Select all Incidents which as Category equal to App. Dev. Int. & Support have
or
equal to Audio Visual and Media have
or...

and
which as Impact equal to University have **or...**
and/or...
and/or...

You can have as many criteria as you wish. The rule of thumb is that an **and** criteria will **lower** the amount of records returned (the result set needs to match criteria A **and** Criteria B) and an **or** will **increase** the amount of records returned (the result set needs to match either Criteria A **or** Criteria B or both).

When you **save** a selection it will ask for a **name** (used in all selection lists), optionally a **description** and who the selection should be available for. These last options are your own personal account, everyone with a specific role in TOPdesk or everyone. Separately you can specify if this selection should be available to the **Self Service Desk** users.

Selection	
Select all Incidents	which as Category equal to App. Dev. Int. & Support have or equal to Audio Visual and Media have and which as Impact equal to University have and/or... and/or...
Store selection	
Name	<input type="text" value="Name of the selection"/>
Description	<input type="text" value="Description for future reference and explanation of why this selection ahs been created."/>
To be used by	<input checked="" type="radio"/> Admin <input type="radio"/> Operators in role <input type="text" value="IM First line"/> <input type="button" value="v"/> <input type="radio"/> All operators <input type="checkbox"/> Callers in Self Service Desk

Reports

Reports present numerical information about data in TOPdesk. The **report wizard** allows you to define reports in a step by step manner.

Step 1:

Report wizard incidents

Step 1 of 4: Filters

Date filter

No

Absolute period

Year

Quarter

Month

Week

Time-span

from

until

2010

Second

July

34

2010

2010

2010

Relative period (whole units)

Year

Quarter

Month

Week

Time-span

From

to

year(s) ago

quarters ago

months ago

weeks ago

ago

ago

Advanced options

All incidents

All resolved incidents

Only current open incidents

Use SLA

Include archive

Selection

< Previous

Next >

Save

Execute

Comments

Filters

Indicate here the data on which you wish to report by choosing a time-span or a selection.

The current report

This is a new report.

The first step is to define the data range you want to report on. This can be a **date range** (either **absolute** or **relative** similar to the selections on dates), a specific **state** (is it open incidents or resolved incidents), have a predefined **selection** applied or a combination of these three. If combined an incident needs to match **all** sets of criteria, date, state and selection.

Step 2:

Step 2 of 4: Fields

<input type="checkbox"/> Number	<i>Line 1</i>	<i>Line 2</i>	<i>Partial</i>	<i>Total</i>
Open at beginning of time-span	<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"/>
Logged	<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"/>
Logged and achieved	<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"/>
Resolved	<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"/>
Resolved and achieved	<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"/>
Open and breached at end of time-span	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Escalated	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
De-escalated	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> SLA				
<input type="checkbox"/> Time taken				
<input type="checkbox"/> Duration				
<input type="checkbox"/> Expenses				

In the second step you define what characteristics you want to know about the data reported on. You can specify separately on **first line**, **second line**, **partial** and **total** of these. There are several different types of fields to report on.

Number will return the **amount of incidents** that match that field. For example **escalated** will show the amount of incidents from our reported data that have been escalated in their lifetime.

SLA will return the **amount of incidents** matching the field, but only when an SLA has been applied.

Time taken will return the **amount of time** recorded in the **time taken** field in all incidents included in the reported data. The result is displayed in hours:minutes.

Duration will return the total **amount of time** that the reported incidents have been open. This is defined as the resolution date minus the call date minus out of hours. The result is displayed in hours:minutes.

Expenses will return the **amount of expenses** recorded in the expenses field in all incidents included in the reported data. The result is displayed in Pounds and Pence.

You can include as many **fields** as desired in the report, but the advice is to limit it. Most often two simple reports are easier to read and interpret than a single all encompassing report with too much data.

Step 3:

Step 3 of 4: Groups

Group 1

(0 Elements)

Group on:

Do not use

Field

Time-span

Percentile

Field

Card type

Sort on:

Default order

Alphabetical

On value

Field

Card type

Ascending

Group 2

Group 3



In the third step the reported data can be **split and grouped**. For example it is great to know 2000 incidents were logged last week, but you may want to see what departments logged how many etc.

TOPdesk allows for **three layers of grouping**. You can group on a **field** (for example group on category or college), on a **time span** (for example report per week to see trend analysis), or on a **percentile** (for example to see what the duration was for 50%, 80%, 95% and 100% of the incidents). You can specify **sorting order** and if it should be ascending or descending.

Second and third groupings are subdivisions of those about, for example grouping first on **category** and then on **sub category** will allow isolation of data of interest for further analysis.

Step 4:

Step 4 of 4: Execution possibilities

	Table Create a new navigable table. Click on the groups of a table to navigate to a new level. Click on the totals to view the results in a list.
	Dynamic table Create a new dynamic table. Click on the groups of a table to view a new level. Click on the totals to view the results in a list.
	Pie chart Create a new report in the form of a Pie chart.
	Bar chart Create a new report in the form of a bar chart.
	Line graph Create a new report in the form of a line graph.

The fourth and last step defines the **output type** of the report. You can switch when viewing the result, but the choice made in step four will determine the default first output.

Table will return a table view of all fields selected in step 2 with the first grouping on a page. This can be zoomed into to view the second grouping and a value can be zoomed into for the third grouping.

Dynamic table will return a table view of all fields selected in step 2 with the first grouping on a page. A value can be expanded to view the second and third grouping. So instead of having a single grouping on a page you can expand and collapse values.

Pie chart will return a pie chart view of a single field selected in step 2. There will be a drop down available to select a different field. By clicking on a pie segment you can zoom into the second and third grouping.

Bar chart and **Line graph** will return a view on all fields selected in step 2. This can be zoomed into to view the second grouping and a value can be zoomed into for the third grouping. The report will return in a single scale, so it is important in step 2 (if you want a bar or line graph) to select fields that are comparable in scale.

You can **save** a report for future reference with similar options to saving a selection.