

Pre-supplied Unidesk Reports¹

Supplied reports

- All reports and selections listed below are published to the role *IM Report Writer (Own)*²
 - They are provided as a starting point
 - They can be copied, modified and saved (under another name)
- All reports listed below use the selection **Select team's calls** which asks for an Operator Group to be input and will select the calls that Operator Group owns (aka final resolver of)
- In this context *Team* means *Operator Group* as there is a 50 character limit to report and selection names
- The Reports Training Guide³ goes into the detail of constructing a report and associated selection
- Change the *Date Filter* in step 1 of the report wizard to change the time period selected

Report name ⁴	Step 1	Step 3			Default graph
	Time interval	1 st grouping	2 nd grouping	3 rd grouping	
Team - Category/Incident type/Status - this year	Current year	Category	Incident type	Status	Pie chart
Team - Category/Subcategory/Day - last month	Last full month	Category	Sub-category	Day	Dynamic table
Team - Category/Subcategory/Entry - last week	Last week (Mon-Sun)	Category	Sub-category	Entry	Table
Team - Incident type/Category/Day - this month	This month	Incident type	Category	Day	Table with details
Team - Incident type/Category/Subcategory - 6 mth	Last 6 months (including this month)	Incident type	Category	Sub-category	Pie chart
Team - Month/Entry/Priority - 2013	2013 to date	Month	Priorities	Source	Line graph
Team - Week/Category/Status - last full 3 months	Last full 3 months	Week	Category	Status	Bar chart

Available fields

There is a multitude of fields available for use in selections and reports⁵. Some are more useful than others.

¹ <http://www.docs.is.ed.ac.uk/docs/uni-desk/Unidesk%20pre-supplied%20reports.pdf>

² Email IS.Helpline@ed.ac.uk to ask for the role of *IM Report Writer (Own)* which gives the ability to write and create/modify reports.

³ <http://www.docs.is.ed.ac.uk/docs/uni-desk/Report%20Training%20v1.1.pdf>

⁴ The fields reported on in step 2 are logged and resolved incidents.

⁵ See Appendix I for lists of commonly used and all fields which can be used in selections and report steps 2 and 3.

Selections

There is a default set system wide for what is displayed when a selection is initially created. This default cannot be changed by an individual operator. However once different fields have selected for view they are retained for that selection.

If used to select a set of data for a report then both view and unviewed fields are available to the report.

A maximum of 10,000 fields are displayed for view from a selection but if exported the limit is 65,536 (Excel 2003 limitation) and an unlimited number for a report.

Reports

Step 1 allows for selection of calls by input filter or time range.

Step 2 allows for selection of which fields to report on

Step 3 allows for selection of which fields to group on. Up to three may be selected and may be a field or a time interval.

Operator Group involvement

Selections allow you to look at different groups of data. You may wish to look at various different involvement in calls that your team has.

Example

Involvement	Part of incident syntax	<i>IS Helpline calls in Feb 2017</i>
Owned (aka Final resolver of)	where Operator Group is equal to IS Helpline	4165
Handled⁶	that have at least 1 Audit trail amendment for Calls where Operator Group is equal to IS Helpline	3433

Combining **Owned** with **Handled** with an **OR** allows you to select all calls that an Operator Group has changed in some way.

⁶ See Appendix II on how to write this selection.

Appendix I - Fields

Commonly used fields

Value	Selection	Report Step 2	Report Step 3	Notes
<i>Brief Description (Details)</i>	Yes		Yes	
<i>Call Date</i>	Yes		Yes	
<i>Category</i>	Yes		Yes	
<i>College/Support Group (Caller)</i>	Yes		Yes	
<i>Completion Date</i>	Yes		Yes	
<i>Creator of the Card</i>	Yes		Yes	
<i>Email (Caller)</i>	Yes		Yes	
<i>Employee No.</i>	Yes		Yes	
<i>Entry</i>	Yes		Yes	Source eg Email, Phone
<i>Incident Number</i>	Yes		Yes	
<i>Incident Type</i>	Yes		Yes	
<i>Line</i>	Yes	Yes		
<i>Logged</i>		Yes		calls logged within the specified time period
<i>Logged and resolved</i>		Yes		calls logged within the specified time period, and subsequently resolved at any point
<i>Login name network</i>	Yes		Yes	UUN
<i>Object ID</i>	Yes		Yes	
<i>Operator Group</i>	Yes		Yes	
<i>Priority</i>	Yes		Yes	
<i>Resolved</i>		Yes		calls resolved within the specified time period
<i>School / Division (Caller)</i>	Yes		Yes	
<i>Standard Solution</i>	Yes		Yes	
<i>Status</i>	Yes		Yes	
<i>Subcategory</i>	Yes		Yes	
<i>Type of user</i>	Yes		Yes	

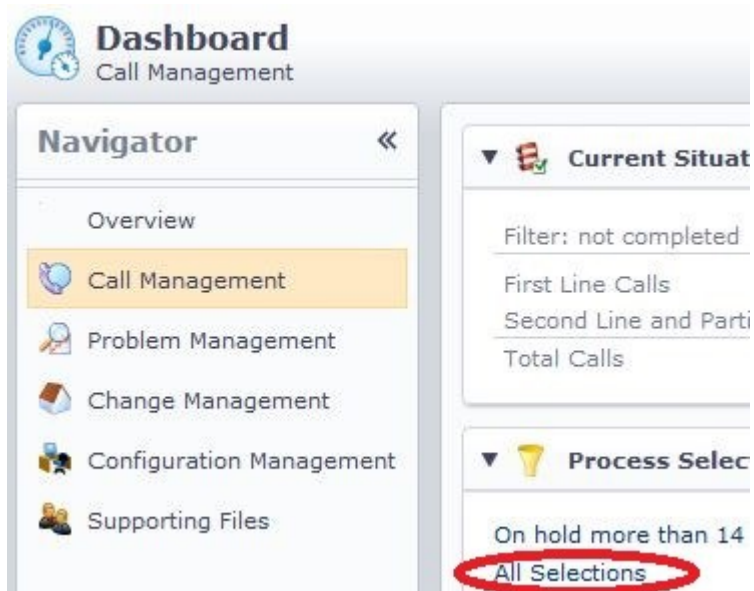
Report Step 3 time spans

Value	Notes
<i>Day</i>	
<i>Week</i>	
<i>Month</i>	Check sort order for this
<i>Quarter</i>	
<i>Year</i>	

Appendix II – Team selections

Creating a selection using the example of *IS Helpline* on page 2

Under *Dashboard* click *All Selections*



Under *New selections* click *All calls* to create a new selection.



You will be presented with a list of many fields – highlighted are the ones you need to make this selection.

Links

Choose from the fields

<p>Caller</p> <ul style="list-style-type: none"> <input type="checkbox"/> Caller (Registered) <input type="checkbox"/> Caller name <input type="checkbox"/> Caller's gender <input type="checkbox"/> College/Support Group (Caller) <input type="checkbox"/> College/Support Group name <input type="checkbox"/> Email (Caller) <input type="checkbox"/> Location <input type="checkbox"/> Preferred contact method <input type="checkbox"/> School / Division (Caller) <input type="checkbox"/> Telephone number (Caller) <input type="checkbox"/> Type of user <p>Card data</p> <ul style="list-style-type: none"> <input type="checkbox"/> Call Number <input type="checkbox"/> Changer of the Card <input type="checkbox"/> Creator of the Card <input type="checkbox"/> Date/time of change <input type="checkbox"/> Date/time of creation 	<p>Escalation</p> <ul style="list-style-type: none"> <input type="checkbox"/> (De-)escalation Operator <input checked="" type="checkbox"/> De-escalated <input type="checkbox"/> De-escalation Reason <input checked="" type="checkbox"/> Escalated <input type="checkbox"/> Escalation Reason <p>Information</p> <ul style="list-style-type: none"> <input type="checkbox"/> 'In progress' duration <input type="checkbox"/> 'On Hold' duration <input type="checkbox"/> 'Resolved' duration <input type="checkbox"/> Actual duration <input type="checkbox"/> Adjusted duration <input checked="" type="checkbox"/> Call Date <input type="checkbox"/> Registered time <input type="checkbox"/> Total Costs <p>Main Call</p> <ul style="list-style-type: none"> <input type="checkbox"/> Main Call 	<p>Planning</p> <ul style="list-style-type: none"> <input type="checkbox"/> Appointment <input type="checkbox"/> Impact <input checked="" type="checkbox"/> On Hold <input type="checkbox"/> On Hold Date <input type="checkbox"/> Priority <input type="checkbox"/> Target Date <input type="checkbox"/> Urgency <p>Processing</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Closed <input type="checkbox"/> Closure Date <input checked="" type="checkbox"/> Completed <input type="checkbox"/> Completion Date <input type="checkbox"/> Operator <input type="checkbox"/> Operator (First Line) <input type="checkbox"/> Operator (Second Line) <input checked="" type="checkbox"/> Operator Group <input type="checkbox"/> Status
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Also available is a list of links to select on by clicking on *Links*. Toggle back to fields by clicking on *Fields*.

Select on links

Fields

Select from links

<p>with</p> <p>(De-)escalation Operator Operator Operator Group</p> <p>Appointment Appointment</p> <p>Caller (Registered) Person</p> <p>Category Category</p> <p>Changer of the Card Creator of the Card/Changer of the Card</p> <p>College/Support Group (Caller) College/Support Group</p> <p>Configuration ID Configuration</p> <p>Creator of the Card Creator of the Card/Changer of the Card</p>	<p>Main Call Call</p> <p>Major Call Call First Line Call Second Line Call</p> <p>Object ID Object</p> <p>Operator Operator Operator Group</p> <p>Operator (First Line) Operator Operator Group</p> <p>Operator (Second Line) Operator Operator Group</p> <p>Operator Group Operator Group</p>	<p>School / Division (Caller) School / Division</p> <p>Service Service Supplier Service</p> <p>Service Contract Preliminary Service Contract Service Contract Preliminary Supplier Contract Supplier Contract</p> <p>Service Level Service Level</p> <p>Standard Solution Standard Solution</p> <p>Subcategory Category</p> <p>Supplier Service Service Supplier Service</p>
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that belong to

- Audit trail entries for Calls
- Audit trail entries for memo fields

Creating a selection for calls that IS Helpline [or your team] has handled at any point

Click on field *Operator Group*.

Type in *your team name* and click *Apply*.

Selection

Select all Calls where Operator Group is equal to
and/or...

Criteria

Operator Group equal to Value IS Helpline

Display archive as possible values

Invert criterion

Apply Remove

Click on the last *or...*

Selection

Select all Calls where Operator Group is equal to IS Helpline *or...*

and/or...

Then click on *Links* under *Select on fields*.

Click on link *Audit trail entries for Calls*.

Click on *where...* [this links the audit trail to your team]

Selection

Select all Calls where Operator Group is equal to IS Helpline *or...*

or

that have at least 1 Audit trail amendment for Calls *where...*

and/or...

and/or...

Click on *Operator Group* under other fields.

Type in *your team name* and click *Apply*.

Selection

Select all Calls where Operator Group is equal to IS Helpline

or

that have at least 1 Audit trail amendment for Calls where Operator Group is equal to
and/or...

and/or...

Criteria

Operator Group equal to Value IS Helpline

Display archive as possible values

Invert criterion

Apply Remove

Select last *and* then *Call Date*.

Selection

Select all Calls where Operator Group is equal to IS Helpline *or...*
or
that have at least 1 Audit trail amendment for Calls where Operator Group is equal to IS Helpline *or...*
and/or...
and/or...

Order by

Select an order ascending
Select an order ascending

Use selection Save as

Select *Relative* and logged *between* and then *1 month* and *1 month* to show the last full month, and *Apply*.

Criteria

Absolute **Relative**

logged between Value 1 month(s) ago and
Value 1 month(s) ago

Then finally click on *Save as* if you want to save your selection and/or *Use selection* to use this selection.

Click on cross symbol as top right of selection window to change the fields displayed. Note that if you use the selection to feed into a report it doesn't matter what fields are displayed – it will pick up all available fields.



In practice it's helpful to add in a few more restrictions around call type, partial calls & Junk category.

Selection

Select all Calls where Operator Group is equal to IS Helpline *or...*
or
that have at least 1 Audit trail amendment for Calls where Operator Group is equal to IS Helpline *or...*
and/or...
and
that are logged between 1 month(s) ago and 1 month(s) ago *or...*
and
where Call Type is equal to Incident
or
is equal to Service request
or...
and
where Line is not equal to Partial Call *or...*
and
where Category is not equal to Junk *or...*
and/or...
and/or...