Pre-supplied Unidesk Reports[1]

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 Guide[3] 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	1st grouping	2nd grouping	3rd 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 reports[5]. 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 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	*IS Helpline calls in Feb 2017*
Owned (aka Final resolver of)	where Operator Group is equal to IS Helpline	4165
Handled[6]	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
Brief Description (Details)	Yes		Yes	
Call Date	Yes		Yes	
Category	Yes		Yes	
College/Support Group (Caller)	Yes		Yes	
Completion Date	Yes		Yes	
Creator of the Card	Yes		Yes	
Email (Caller)	Yes		Yes	
Employee No.	Yes		Yes	
Entry	Yes		Yes	Source eg Email, Phone
Incident Number	Yes		Yes	
Incident Type	Yes		Yes	
Line	Yes	Yes		
Logged		Yes		calls logged within the specified time period
Logged and resolved		Yes		calls logged within the specified time period, and subsequently resolved at any point
Login name network	Yes		Yes	UUN
Object ID	Yes		Yes	
Operator Group	Yes		Yes	
Priority	Yes		Yes	
Resolved		Yes		calls resolved within the specified time period
School / Division (Caller)	Yes		Yes	
Standard Solution	Yes		Yes	
Status	Yes		Yes	
Subcategory	Yes		Yes	
Type of user	Yes		Yes	

Report Step 3 time spans

Value	Notes
Day	
Week	
Month	Check sort order for this
Quarter	
Year	

Appendix II – Team selections

Creating a selection using the example of *IS Helpline* on page 2
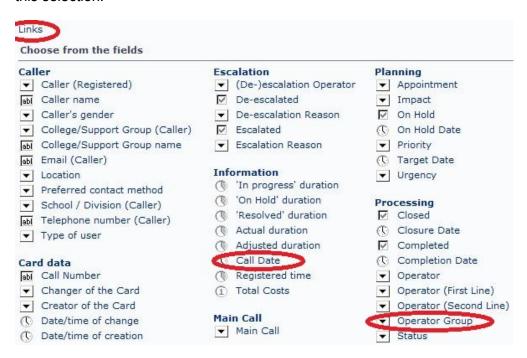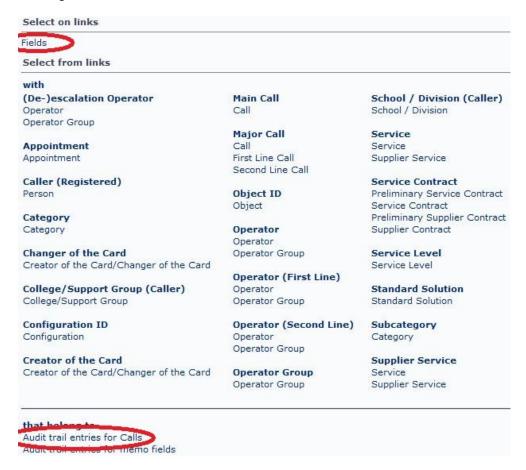
Under *Dashboard* click *All Selections*

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.
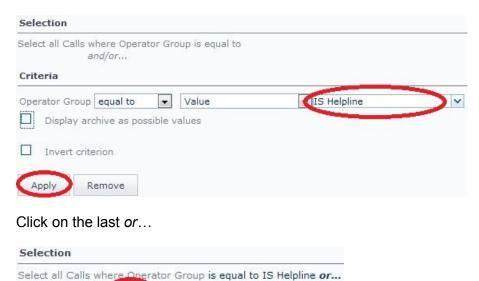

Also available is a list of links to select on by clicking on *Links*. Toggle back to fields by clicking on *Fields*.

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*.

Click on the last *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]

Click on *Operator Group* under other fields.

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

Select last *and* then *Call Date*.

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

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.