



Northwestern University  
**IT Service Manager**

# Reporting Manual

*Prepared by*

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## CONTENTS

1. Introduction .....	1
2. Reporting .....	1
2.1 Reporting Functionality .....	1
2.2 Creating Reports .....	1
2.2.1 Single Issue/Quick Reports .....	1
2.2.2 Custom Non-Metric Reports .....	2
2.2.3 Custom Metrics/Graphics Reports .....	7
2.3.4 Display Position .....	8
3. Chart Features .....	8
3.1 Drilling Down on a Chart .....	8
3.1.1 How to drill down on a chart .....	9
3.2 Formatting Custom Charts .....	10
3.2.1 Modifying Charts .....	10
4. Auto Run Reports .....	12

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## 1. INTRODUCTION

The primary function of the IT Service Manager system is to keep track of IT service requests, break/fix incidents, or short term projects. Users can enter information into IT Service Manager, and this information is then accessible to other users. This sharing information allows users to easily follow each other's progress, search for specific problems, and communicate with each other.

To compliment this functionality, IT Service Manager contains a number of reporting options, which range from simple keyword searches to multi-level metrics with color charts. Practically any data field that exists in IT Service Manager can be reported on to analyze activity, trends, or statistics.

## 2. REPORTING

### 2.1 REPORTING FUNCTIONALITY

IT Service Manager contains a number of reporting options, which range from simple keyword searches to multi-level metrics with color charts. Practically any data field that exists in IT Service Manager can be reported on to analyze activity, trends, or statistics.

Reporting can be conducting using basic reporting features or advanced reporting features.

#### **Basic Reporting Functionality**

- Overview of different reporting tools.
- Creating basic custom reports.
- Creating custom reports with metrics.
- Automated delivery of reports.

#### **Advanced Reporting Functionality**

- Overview of Built-in Metrics Reports.
- KPI's that can be produced by IT Service Manager.
- Advanced Date and Time controls.
- Printing issues in different report formats.

### 2.2 CREATING REPORTS

IT Service Manager has several types of reporting tools, including the following:

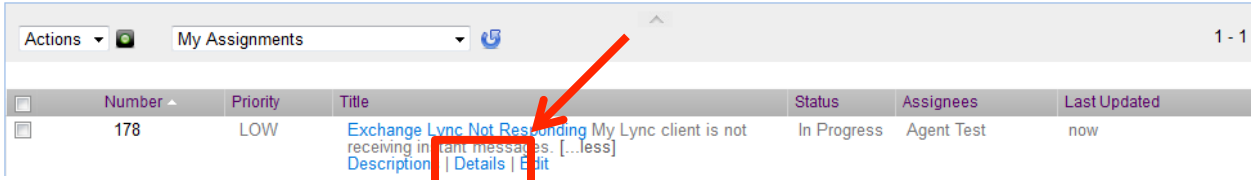
- Single Issue/Quick Reports
- Custom Reports (with the option for Custom Metrics)
- Built-in Metrics Reports

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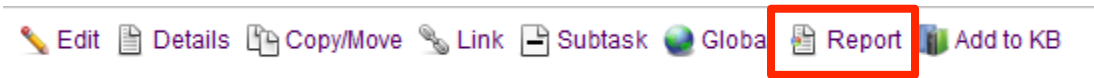
#### 2.2.1 SINGLE ISSUE/QUICK REPORTS

Single Issue/Quick Reports appear on the Details window of each Issue.

1. From the IT Service Manager Home Page, find the Issue you would like to view and *click* the **Details** link.



2. The Issue will open in the **Details** view.
3. *Click* the **Report** button on the Issue Details page.



4. Only the fields that contain data appear in the report. (**Note:** Master Issue reports will contain a list of all Subtasks. Global Issue Reports will contain a list of all Global Links.)

### Exchange Lync Not Responding

<b>Issue Number</b>	178	<b>Submitted On</b>	01/10/2013
<b>Priority</b>	Low	<b>Submitted At</b>	14:48:23
<b>Status</b>	In Progress	<b>Last Edited On</b>	01/10/2013
<b>Submitted By</b>	Agent Test	<b>Last Edited At</b>	14:53:58
<b>Assignees</b>	Agent Test		
<b>Description</b>			
<i>Entered on 01/10/2013 at 14:48:22 CST (GMT-0600) by Agent Test:</i> My Lync client is not receiving instant messages.			
<b>SLA Due Date</b>	01/17/2013 9:48 AM	<b>SLA Response Time</b>	01/11/2013 1:48 PM
<b>Request Type</b>	Incident	<b>Submission Tracking</b>	Agent
<b>Service Family</b>	Email, Calendaring, Messaging and Collaboration	<b>Service</b>	Exchange - central
<b>Category</b>	Client	<b>Sub-Category</b>	Lync - Windows
<b>Impact</b>	Single User	<b>Urgency</b>	Routine
<b>Complete Notes</b>			
<i>Entered on 2013-01-10 at 14:48:22 by Agent Test :</i> <p>Reinstalled client, reconfigured Lync</p>			
<b>Completion Code</b>	Resolved Successfully	<b>Select?</b>	No
<b>Last Name</b>	Smith	<b>First Name</b>	Timmy

## 2.2.2 CUSTOM NON-METRIC REPORTS

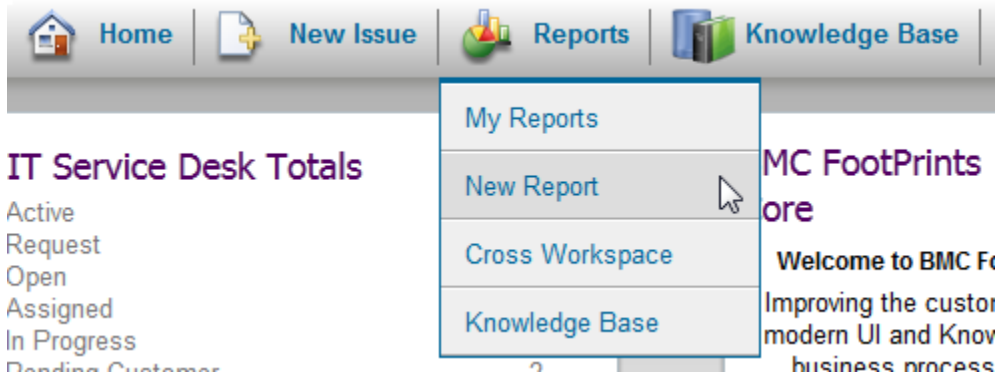
Custom Reports provides Agents with the ability to create report templates based on any combination of criteria, including many appearance-formatting options. These formatting options include the following:

- Headings
- Columns

- Sorting
- Color Graphs and Charts

## CREATING CUSTOM NON-METRIC REPORTS

1. From the IT Service Manager Home Page, position the mouse cursor over the **Reports** tab.



2. *Select New Report.*
3. Use the data element guides below to select the appropriate fields for the report.

## STYLES TAB

### New Custom Report

Style	Heading	Formatting	Issue Criteria	Contact Criteria	Advanced Criteria	Save/Run
<input checked="" type="radio"/> Columns	One Issue per line in a table.					
<input type="radio"/> Wrapped	A list of Issues. Supports line breaks; good for reports that include many fields.					
<input type="radio"/> Metrics/Graphics	Display sums, averages, and counts only.					
<input type="radio"/> Export	Export data to a text file. Allows FootPrints Service Core data to be imported into spreadsheets or other programs.					
<input type="checkbox"/> Include metrics with your Column or Wrapped style report.						

- **Columns:** Issue data is displayed in fixed columns. One Issue is displayed per row.
- **Wrapped:** Each Issue returned is displayed in a table. Line breaks can be used to break data into multiple rows.
- **Metrics/Graphics:** Create custom metrics and graphs of counts, averages, and sums on any field. Both first and second level metrics are supported. Output design options include table, bar, and pie charts.
- **Export:** Export the data to a text file. The exported text file can then be imported into another application.
- **Combo:** Includes metric charts and graphs in Column or Wrapped reports.

## HEADING TAB

- The Report Title appears at the top of the new report, but it is not the “saved” name of the report.
- Other heading options include date, time, workspace name, and logo graphic.

## FORMATTING TAB

### New Custom Report

Style	Heading	Formatting	Issue Criteria	Contact Criteria	Advanced Criteria	Save/Run
-------	---------	------------	----------------	------------------	-------------------	----------

**FIELDS DISPLAYED**

**Type of Field**

FootPrints Service Core Fields

Issue Information

Contact Information

**Fields**

- Age of Issue
- Assignees
- Closed By
- Date Closed
- Date Submitted
- Description
- Email History
- History
- Issue Number
- Issue Type
- Last Edit Date
- Last Edit Time

**Selected Fields**

- Issue Number
- Priority
- Status
- Title
- Last Edit Date
- Date Submitted
- Assignees

**Descriptions to include**

All Descriptions  Original  Most Recent  2 Most recent  3 Most recent

**Multi-line field wrapping**

Don't Wrap  Wrap every  characters

**Process/Phase Voting Details**

Display Final Decision information for each Issue

Display Voting History for each Issue

Filter Voting History as follows:

**SORT RESULTS BY**

Choose primary and optional 2nd/3rd sort fields. To separate groups with headings, click the appropriate "Heading" boxes.

Field	Order	Heading
<input type="text" value="Issue Number"/>	<input type="text" value="ascending"/>	<input type="checkbox"/>
<input type="text" value="none"/>	<input type="text" value="ascending"/>	<input type="checkbox"/>
<input type="text" value="none"/>	<input type="text" value="ascending"/>	<input type="checkbox"/>

- **Fields Displayed:** The fields included in the reports.
- **Descriptions to include:** Options include all descriptions, only the original description, only the most recent description, and either the 2 or 3 most recent descriptions.
- **Multi-line field wrapping:** Options include don't wrap the descriptions or wrap every X number of characters.
- **Sort Results By:** Choose the primary and optional secondary and tertiary fields for sorting the report. To group by a field, enable the appropriate heading check box.

## ISSUE CRITERIA TAB

### New Custom Report

Style	Heading	Formatting	Issue Criteria	Contact Criteria	Advanced Criteria	Save/Run
<i>(Note: When no values are selected for a choice/drop-down field, there will be no search on that field.)</i>						
GENERAL INFORMATION						
Title	<input type="text"/>	Keyword	<input type="text"/>			
Description	<input type="text"/>	Attachment filename	<input type="text"/>			
Assigned to	Not Assigned Cafe-ChartofAccount Cafe-FAMIS Cafe-FaxServer Cafe-GeneralLedger Cafe-Grants Cafe-Managers Cafe-NUPlans Advanced Assignment Controls	Submitted by	Keith S Adams Tony Adcock Ashish Kumar Agrawal Charlotte Aines Armando Alaniz Amraz Alavi Matthew Alexander Daniel Altneu			
Priority	Critical High Medium Low Miscellaneous	Status	Open Assigned In Progress Pending Customer Pending Other			
Request Type	Service Request Incident Miscellaneous (no data)	Submission Tracking	Web Email Web - Auto Suggest Agent Agent Email	Impact	Single User Multiple Users Building Department University/Campus/School (no data)	
Urgency	Routine Elevated Immediate Critical (no data)					
SLA Response Time	on <input type="text"/> Mon <input type="text"/> Day <input type="text"/> Year <input type="text"/> <input type="checkbox"/> current date (and) <input type="text"/> Mon <input type="text"/> Day <input type="text"/> Year <input type="text"/> <input type="checkbox"/> current date <input checked="" type="radio"/> Exact <input type="radio"/> Relative <input type="radio"/> Range <input type="radio"/> Empty					
SLA Due Date	on <input type="text"/> Mon <input type="text"/> Day <input type="text"/> Year <input type="text"/> <input type="checkbox"/> current date (and) <input type="text"/> Mon <input type="text"/> Day <input type="text"/> Year <input type="text"/> <input type="checkbox"/> current date <input checked="" type="radio"/> Exact <input type="radio"/> Relative <input type="radio"/> Range <input type="radio"/> Empty					
Preferred Phone Number	<input type="text"/>	Select?	Yes No (no data)			

Use the Issue Criteria tab to select data fields by which Issues will be selected and run in the report. At a minimum, the following criteria can be selected:

- Title
- Keywords
- Description
- Attachment Filenames
- Assigned to
- Submitted by
- Priority
- Status

## CONTACT CRITERIA TAB

Use the Contact Criteria tab to select user contact information within an Issue. (**Note:** When no values are selected for a choice/drop-down field, there will be no search in that field.)

## ADVANCED CRITERIA TAB

**New Custom Report** Help

Style	Heading	Formatting	Issue Criteria	Contact Criteria	<b>Advanced Criteria</b>	Save/Run
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**ISSUE TYPES TO INCLUDE**

*Select all Issue Types*

Regular Issues

Master Issues

Subtasks

Global Issues

GlobalLinks

Group Master Issues with Subtasks

Group Global Issues with GlobalLinks

**DATE, TIME, AND AGE CRITERIA**

**Date**       current date (and)     current date

Exact  Relative  Range

**Date Closed**      current date (and)     current date

Exact  Relative  Range  Empty

**Time**    (and)

**Age**   DAYS and  HOURS old

**Include Only**  First  Last  Issues found Search Only Issue Numbers  through

**Pending Clock**

Note: this will affect only the output of "Time to Close" and "Age" Calculations. It will not affect the search criteria or the Issues returned.

Don't include time outside of the Workspace Work Schedule

Don't include time Issues spent in the following Statuses:

Open

In Progress

Pending Customer

Pending Other

Pending Vendor

**MULTIPLE CRITERIA**

Select an operator to connect your criteria

And  Or

The Advanced Criteria tab provides the ability to use advanced date and time filters, including the method for calculating the *Time to Close* and *Age of Issue* statistics. The following options are included:

- Search based on the time an Issue was last created or last edited.
- Given an Agent-specified number, include only the most recent number of Issues found.
- Don't include time outside of the Workspace Work Schedule. Enable this option for IT Service Manager to calculate the age of issue and time to close based on defined working hours instead of real time.
- Don't include time Issues spent in the following statuses. Enable this option when the time spent on an Issue in a particular status or Issues with a certain status (i.e. Pending) should NOT be included in time calculations.

## SAVE/RUN REPORT

After entering all report information, in addition to running, the report can be saved. To save the report, enter a name, and *Click Go*.



## 2.2.3 CUSTOM METRICS/GRAPHICS REPORTS

Metric reports return statistical data and metrics about a Workspace, instead of return Issue data. The steps for these reports are generally the same as for non-metric reports, though there are several additional settings to specify.

### CREATING CUSTOM METRIC/GRAPHICS REPORTS

1. From the IT Service Manager Home Page, position the mouse cursor over the **Reports tab**.
2. *Select New Report.*

#### New Custom Report

Style	Heading	Metrics	Issue Criteria	Contact Criteria	Advanced
<input type="radio"/> Columns	One Issue per line in a table.				
<input type="radio"/> Wrapped	A list of Issues. Supports line breaks; good for reports that include many fields.				
<input checked="" type="radio"/> Metrics/Graphics	Display sums, averages, and counts only.				
<input type="radio"/> Export	Export data to a text file. Allows FootPrints Service Core data to be imported into spreadsheets.				
<input type="checkbox"/>	Include metrics with your Column or Wrapped style report.				

3. *Select Metrics/Graphics* on the Style Tab. Allow application to reload.
4. *Select the Metrics tab.* Options for data elements within the Metrics tab are detailed below.

### METRICS TAB

#### New Custom Report

Style	Heading	Metrics	Issue Criteria
Type:	<input checked="" type="radio"/> Count	<input type="radio"/> Average	<input type="radio"/> Sum
Field:	(select field) ▼		
Subtotal By:	(none) ▼		
Format:	table and chart ▼		
Chart Type:	Bar ▼		
Sort:	by alphabetical or logical order ▼		
	<input type="button" value="+ Add"/>	<input type="text"/>	
	<input type="button" value="X Delete"/>	<input type="text"/>	

**Type** includes the following options:

- **Count:** A count or breakdown on field data. This shows how many times an entry was made into the selected field.
- **Average:** Only applies to numeric and time data; produces the average of values in the selected field. This applies only to built-in statistics—including age of issue, time to close, total billing, and total time—and custom number fields.

- **Sum:** Only applies to numeric and time data; produces the sum of the values in the selected field.

**Field** is used for creating the metric. (**Note:** The **Date Period field** will only appear when a date or date-time field is selected from the Field menu. The date period allows for reporting Issues based on the day, week, month, year, day of week, hour of day, or hour in the date or date-time field. For example, if a date is chosen to submit for the field, and month for the date period, a breakdown of the number of Issues submitted for each respective month is displayed.)

**Subtotal By** provides second level metrics for reporting. For example, if the average time to close an Issue is selected as the first field and an assignee is selected as the subtotal, then the average time to close the Issue is broken down for the Agent assigned.

**Format** allows selection of the output style of the metric. The options include displaying the data in a text-based table, a color graphical chart, or both.

**Chart Type** provides the option of choosing a bar or pie chart (if Chart or Table and Chart are selected).

**Sort** includes the following options:

- **By Alphabetical or Logical Order:** Data is sorted by alphabetical or logical field order.
- **By Metric Value Descending:** Data is sorted by frequency or amount in a descending manner with the highest number listed first.

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#### 2.3.4 DISPLAY POSITION

For combo reports the metrics or graphics can be displayed before or after the list of returned Issues. This option is only provided if Columns or Wrapped on the Style tab are enabled. To enable them *select* **Include metrics with your Column or Wrapped style report** option on the Style tab.

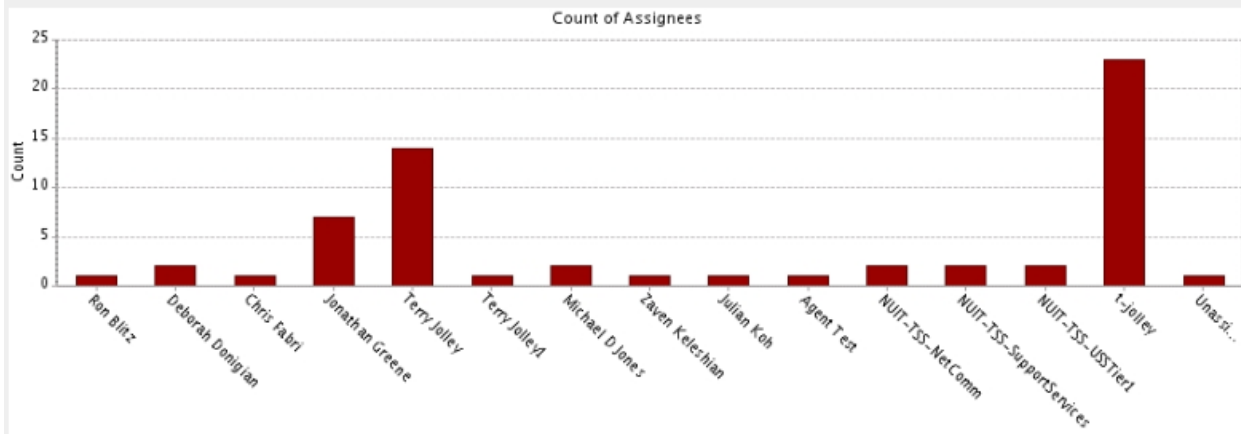
### 3. CHART FEATURES

#### 3.1 DRILLING DOWN ON A CHART

Once a chart is added to a report, the IT Service Manager drill down feature can be used to display the specific records that comprise the statistics included in the chart. For example, a chart can be created that displays the number of overdue work orders by Agent, and the drill down feature can then display the specific Issues that are overdue.

### IT Service Desk: Assignee's Ticket Totals (03:30 PM, 01/14/2013)

This report contains data from 59 Issues.



Count of Assignees

Assignee	Count
Ron Blitz	1
Deborah Donigian	2
Chris Fabri	1
Jonathan Greene	7
Terry Jolley	14
Terry Jolley1	1
Michael D Jones	2
Zaven Keleshian	1
Julian Koh	1
Agent Test	1
	2
NUIT-TSS-NetComm	2
NUIT-TSS-SupportServices	2
NUIT-TSS-USSTier1	23
t-jolley	1
Unassigned	1

#### 3.1.1 HOW TO DRILL DOWN ON A CHART

1. *Create* or *run* a **report** that includes a chart.
2. *Position* the mouse cursor over one of the bars.
3. *Click* **selection**.
4. The Home Page is displayed with the Issues represented by the selected bar.

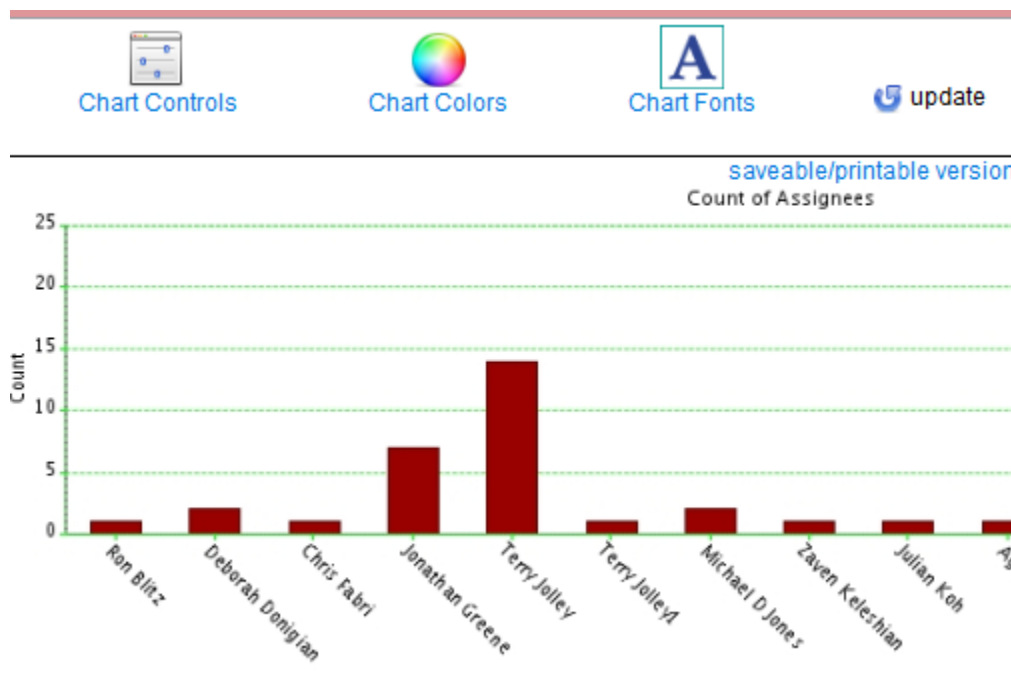
## 3.2 FORMATTING CUSTOM CHARTS

Once a report that includes a chart is created, modifications can be made for easier viewing, including options for the following:

- Chart Controls
- Chart Colors
- Chart Fonts

### 3.2.1 MODIFYING CHARTS

1. *Create or run a **report*** that includes a chart.
2. *Position* the mouse cursor over one of the bars. When the cursor is displayed as a hand, *click* the **chart**.
3. *Select a **tool***. (The functionality of each tool is detailed below.)



4. Once edits are completed, *click* the **Redraw** button to preview the changes.
5. If everything is displayed as intended, *click* the **Update** button on the chart formatter window to apply the changes.

### CHART CONTROLS

The Chart Controls menu includes the following features:

- Modify chart style for 2D or 3D view
- Increase or decrease the space between bars (for a bar chart)
- Modify the title
- Increase or decrease image size

- Modify fill to be solid, left-to-right, or centered
- Add an X a/o Y title
- Add a footer
- Choose if annotations should be included
- Determine the cutoff amount for “Other”

### Chart Controls

Chart Style 
Space Between Bars

Chart Title   
(use <BR> to add a line break)

Image Size  ×   
(width × height in pixels)

Grid 
Fill Mode

X Axis Title 
Y Axis Title

Footer

Annotations

"Other" Cutoff   
(set to zero for no cutoff)

Redraw

[close window](#)

### CHART COLORS

Use the Chart Colors menu to select the colors for chart attributes. The menu also includes a color reference chart to provide a visual representation of the colors available.

### Chart Colors

Title 
Footer

Axes, grid, ticks 
Axis Titles

Axis Labels 
Count

Redraw

[close window](#)

### Color Reference


White	Dark Green	Hunter Green	Medium Wood	Sienna
Red	Dark Green Copper	Indian Red	Midnight Blue	Silver
Green	Dark Olive Green	Khaki	Navy Blue	Sky Blue
Blue	Dark Orchid	Light Blue	Neon Blue	Slate Blue
Magenta	Dark Purple	Light Gray	Neon Pink	Spicy Pink
Cyan	Dark Slate Blue	Light Steel Blue	New Midnight Blue	Spring Green
Yellow	Dark Slate Gray	Light Wood	New Tan	Steel Blue
Black	Dark Tan	Lime Green	Old Gold	Summer Sky
Aquamarine	Dark Turquoise	Mandarin Orange	Orange	Tan
Baker's Chocolate	Dark Wood	Maroon	Orange Red	Thistle
Brass	Dim Gray	Medium Aquamarine	Orchid	Turquoise
Bright Gold	Dusty Rose	Medium Blue	Pale Green	Very Dark Brown

## CHART FONTS

Use the Chart Fonts menu to select the font family and re-size chart attributes. (**Note:** if either value is changed, both values will need to be changed.)

**Chart Fonts**

	Family	Size
Title	SansSerif	11
Axis Titles	Monospaced	auto
Axis Labels	SansSerif	auto
Annotations	auto	auto
Footer	auto	auto

 Redraw

[close window](#)

You must specify a family and a size if you change either value.  
(If either value is still auto, the other value will be ignored.)

## 4. AUTO RUN REPORTS

Reports can be configured to run automatically at set times, and saved to either a shared directory on a server or emailed to anyone with an email address. These auto run reports are configured by the IT Service Manager administrators. If you need to configure Auto Run reports, submit a ticket to TSS-USS-Tier II.