Northwestern University
IT Service Manager

Reporting Manual

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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

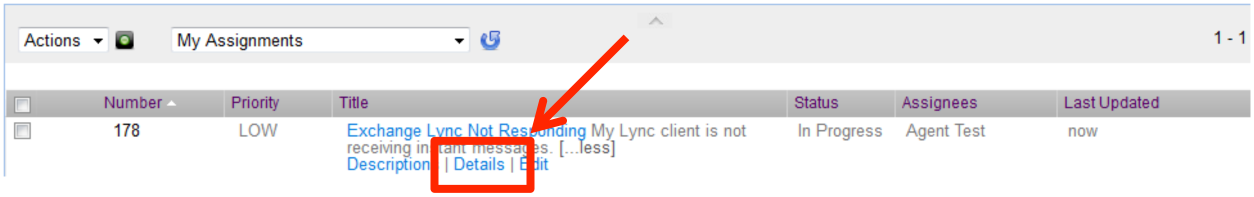
IT Service Manager has several types of reporting tools, including the following:

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

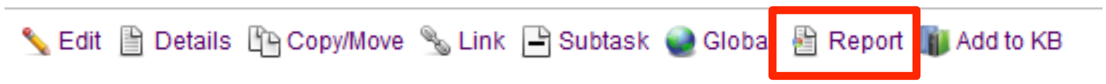
2.2.1 SINGLE ISSUE/QUICK REPORTS

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

Issue Number	178	**Submitted On**	01/10/2013
Priority	Low	**Submitted At**	14:48:23
Status	In Progress	**Last Edited On**	01/10/2013
Submitted By	Agent Test	**Last Edited At**	14:53:58
Assignees	Agent Test		

Description

Entered on 01/10/2013 at 14:48:22 CST (GMT-0600) by Agent Test:
My Lync client is not receiving instant messages.

SLA Due Date	01/17/2013 9:48 AM	**SLA Response Time**	01/11/2013 1:48 PM
Request Type	Incident	**Submission Tracking**	Agent
Service Family	Email, Calendaring, Messaging and Collaboration	**Service**	Exchange - central
Category	Client	**Sub-Category**	Lync - Windows
Impact	Single User	**Urgency**	Routine

Complete Notes

Entered on 2013-01-10 at 14:48:22 by Agent Test :

<p>Reinstalled client, reconfigured Lync</p>

Completion Code	Resolved Successfully	**Select?**	No
Last Name	Smith	**First Name**	Timmy

2.2.2 CUSTOM NON-METRIC REPORTS

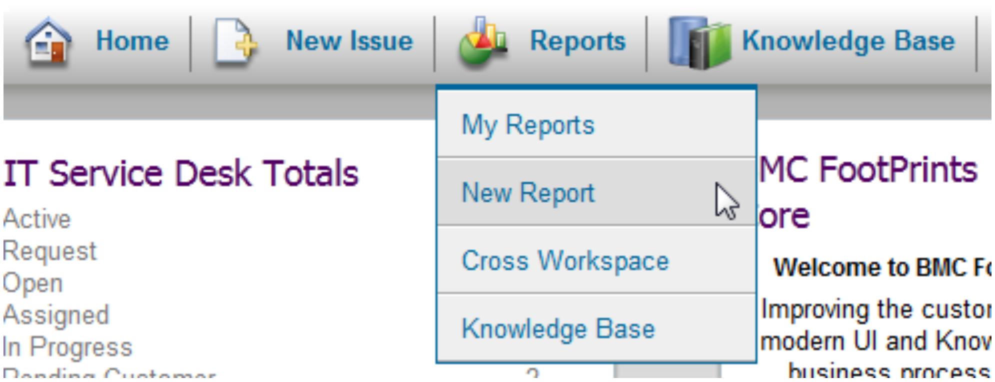
Custom Reports provides Agents with the ability to create report templates based on any combination of criteria, including many appearance-formatting options. These formatting options include the following:

- Headings
- Columns

- Sorting
- Color Graphs and Charts

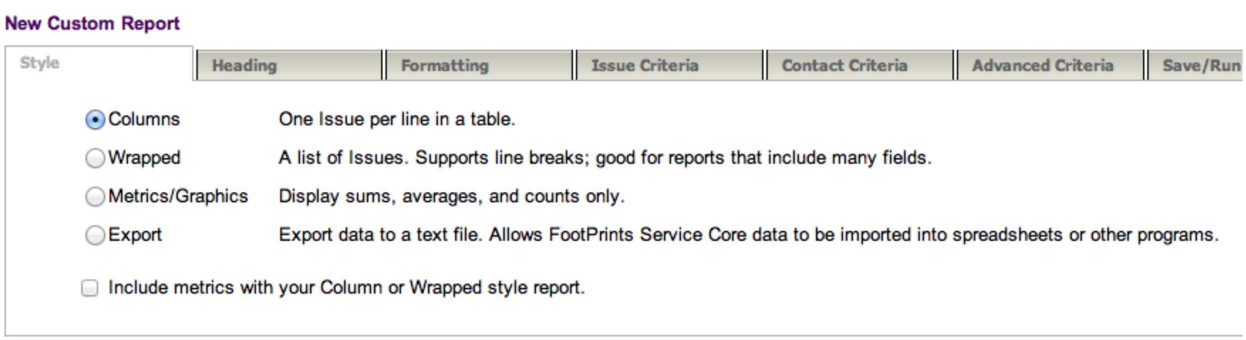
CREATING CUSTOM NON-METRIC REPORTS

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

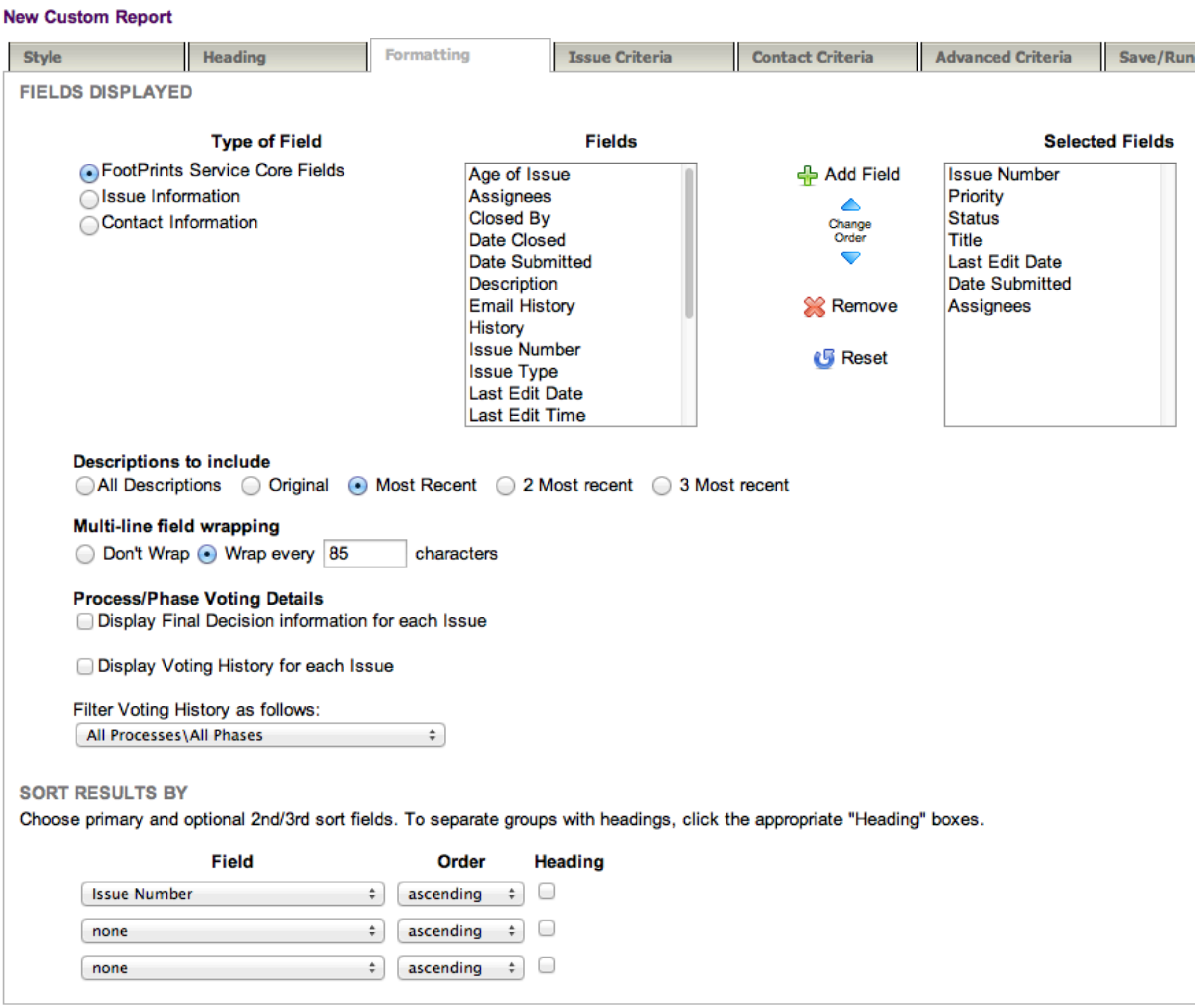


- **Columns**: Issue data is displayed in fixed columns. One Issue is displayed per row.
- **Wrapped**: Each Issue returned is displayed in a table. Line breaks can be used to break data into multiple rows.
- **Metrics/Graphics**: Create custom metrics and graphs of counts, averages, and sums on any 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

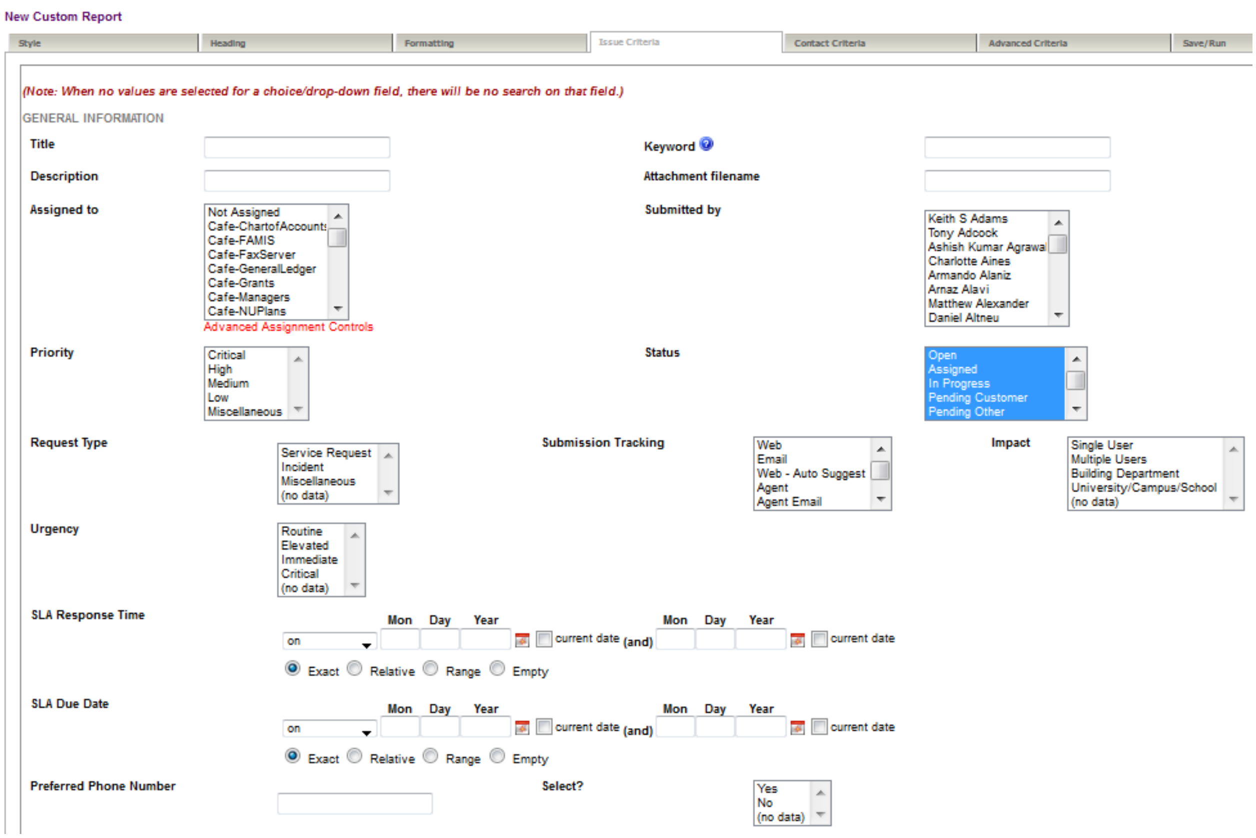
- The Report Title appears at the top of the new report, but it is not the “saved” name of the report.
- Other heading options include date, time, workspace name, and logo graphic.

FORMATTING TAB



- **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



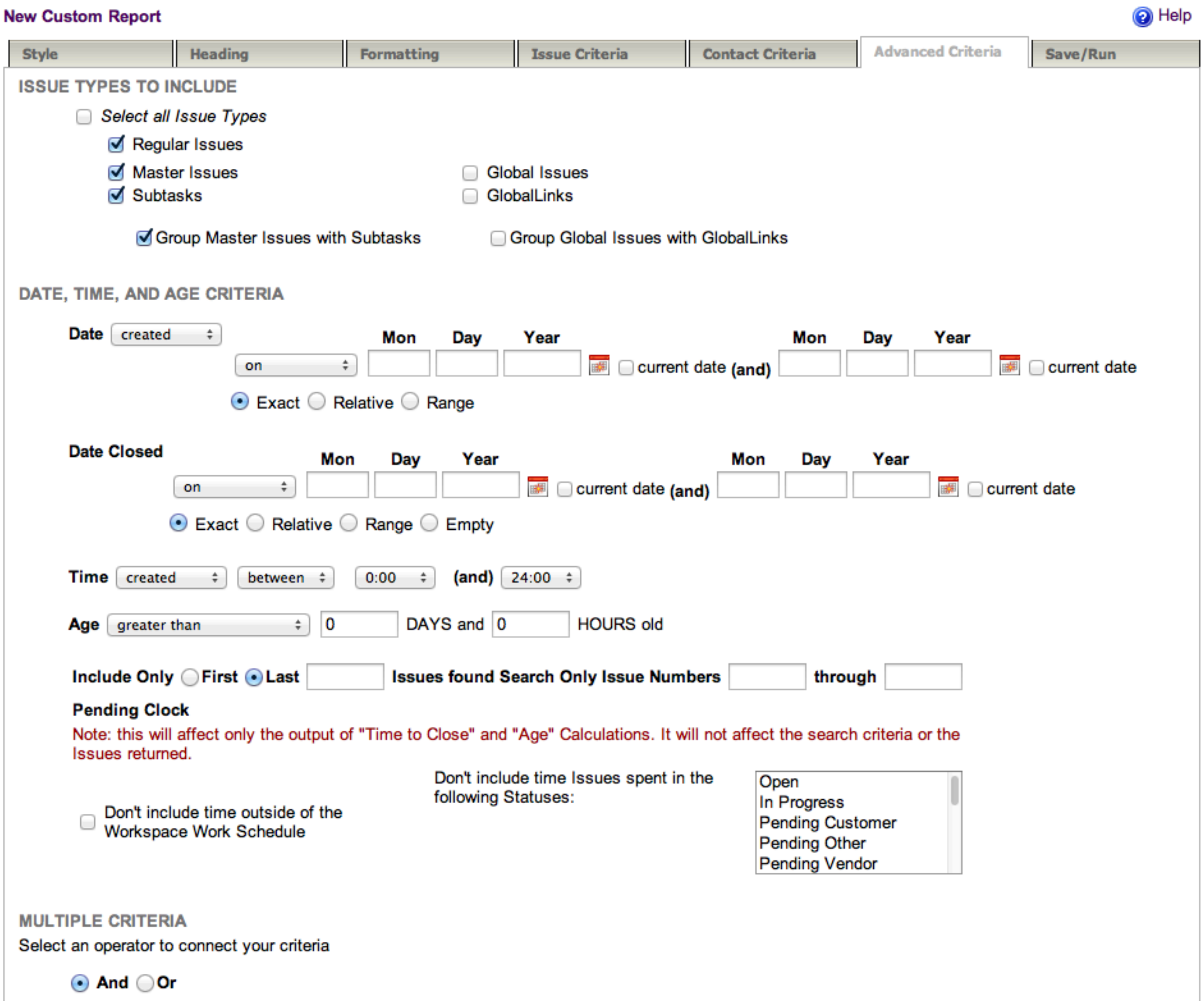
Use the Issue Criteria tab to select data fields by which Issues will be selected and run in the report. At a minimum, the following criteria can be selected:

- 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



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

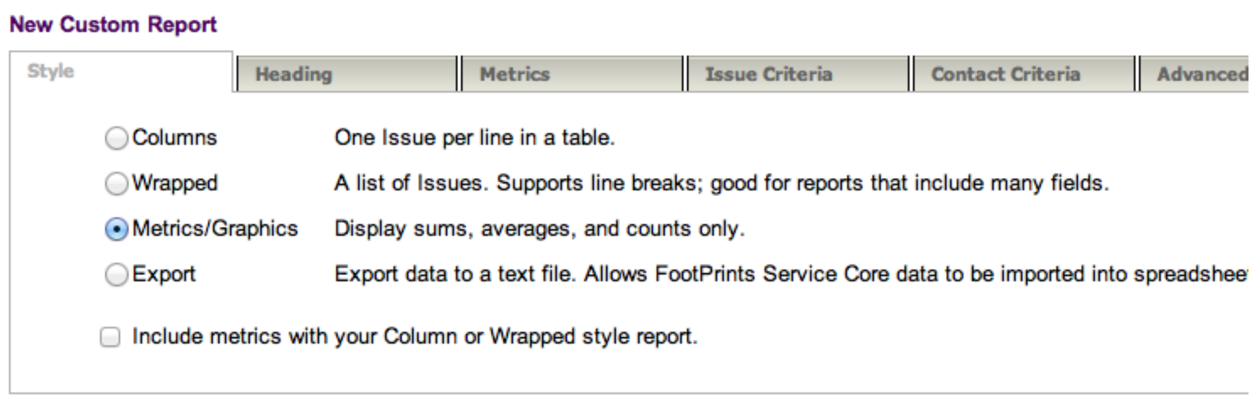
After entering all report information, in addition to running, the report can be saved. To save the report, enter a name, and *Click* **Go**.

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.

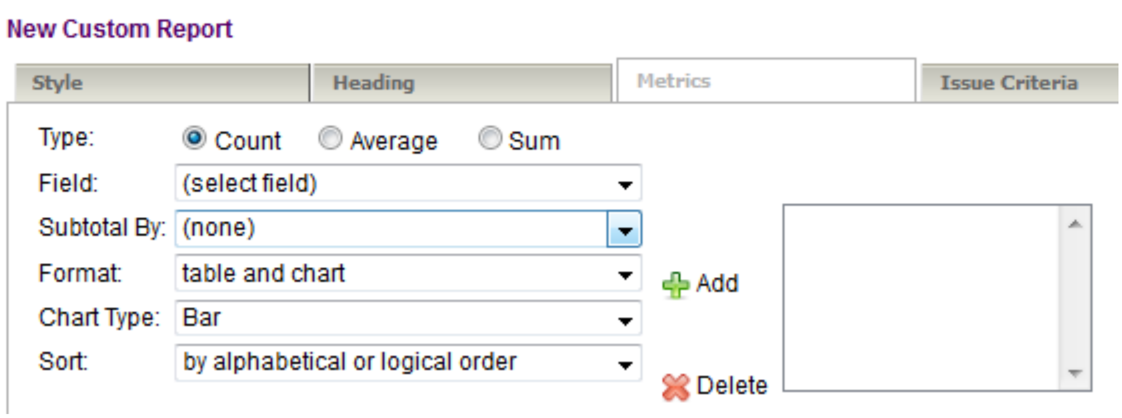
CREATING CUSTOM METRIC/GRAPHICS REPORTS

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



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



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.

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.

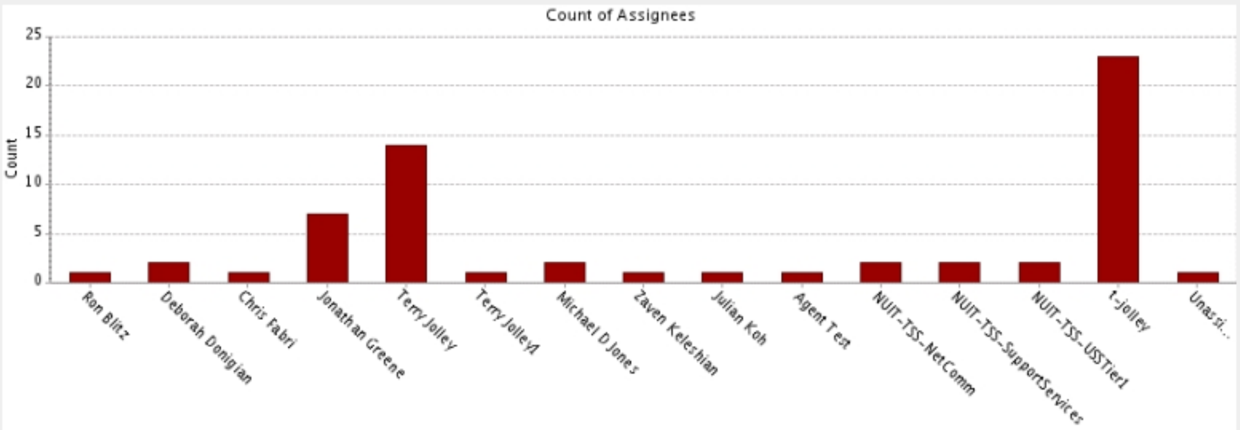
3. CHART FEATURES

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

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.

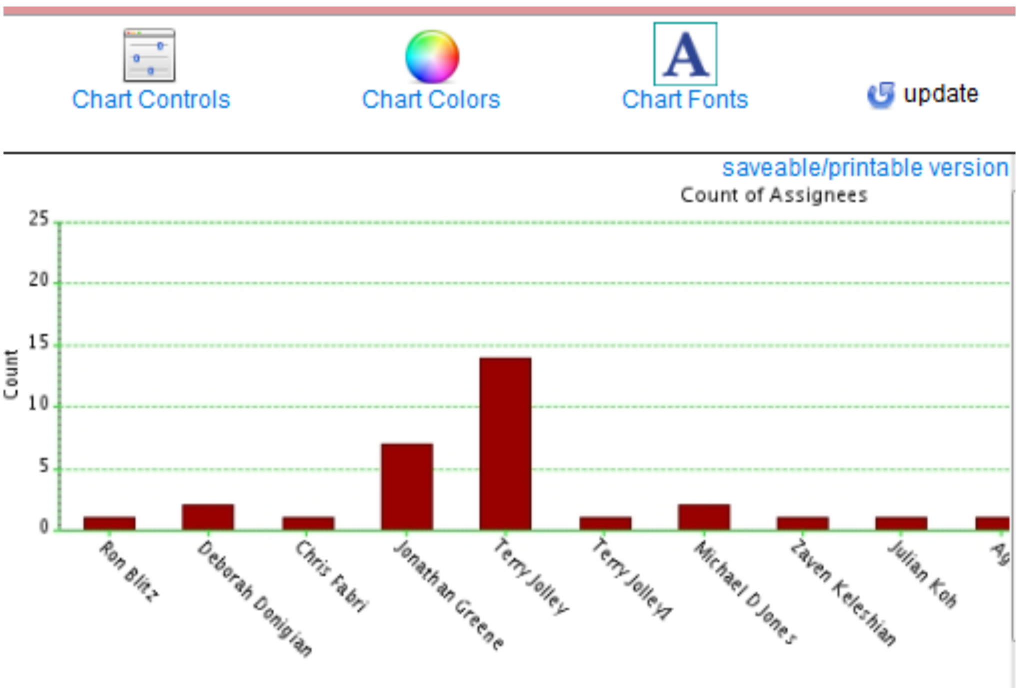
3.2 FORMATTING CUSTOM CHARTS

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”

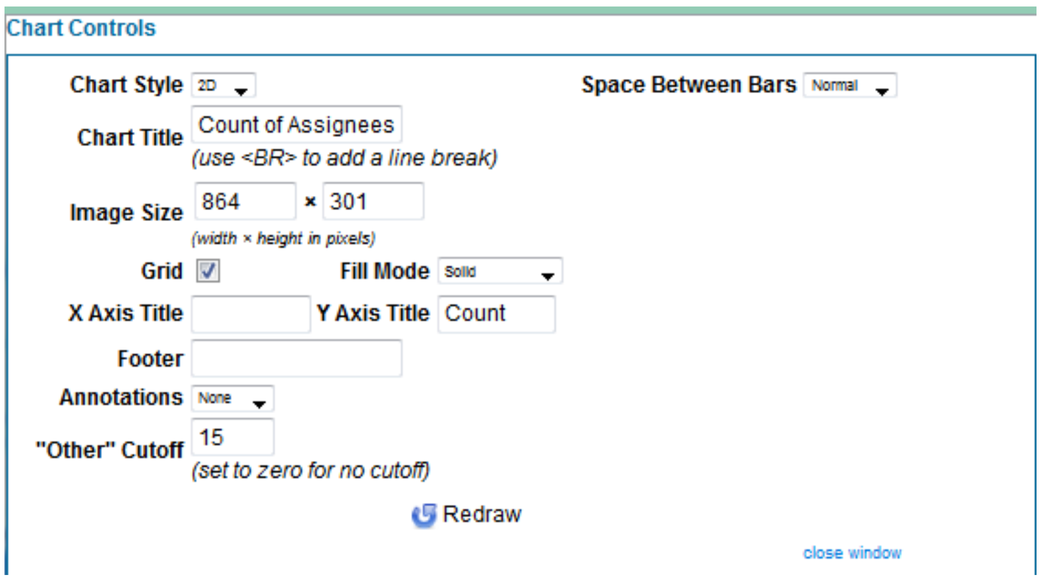


CHART COLORS

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.

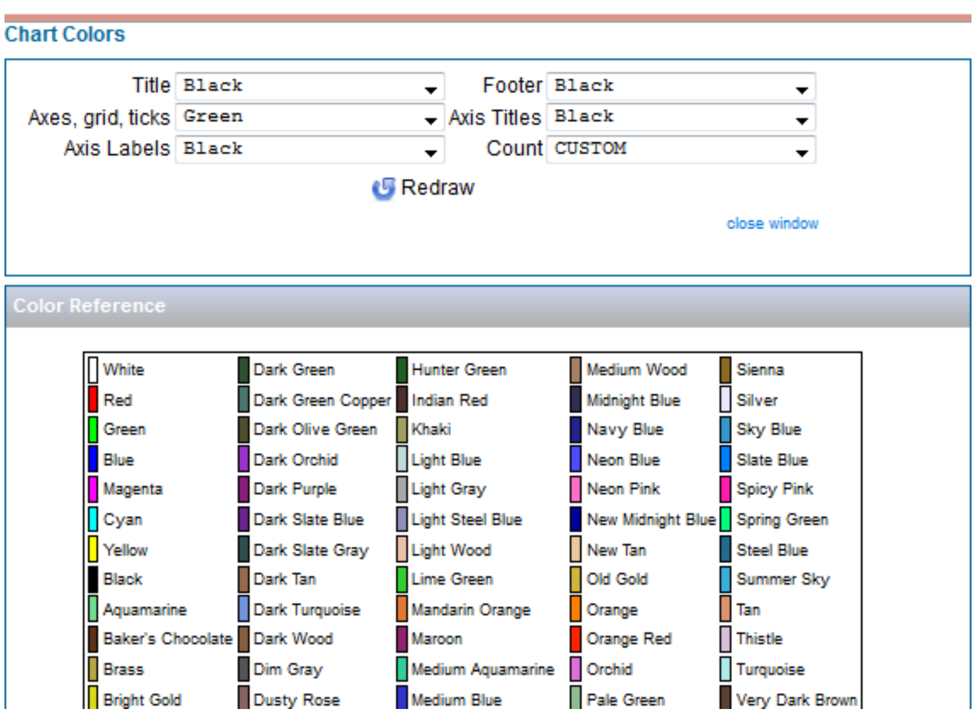
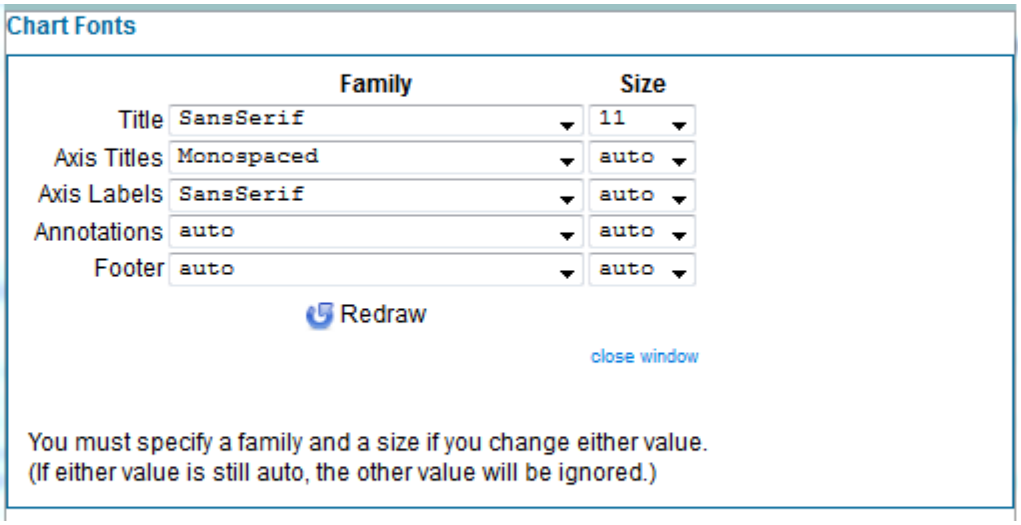


CHART FONTS

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



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.