Self-Help Guide

TeamDynamix (TDX): Create and Manage Reports

This self-help guide is for TeamDynamix users who want to learn how to run, create, and manage reports. Users can add a report to their desktop, share a report they create with a Group, and set up an email delivery schedule for others to view the reports.

Create and Manage Reports

Get Started with Reports

Understand the Reporting Function in TDX

Body

TDX comes with a lot of existing reports which you can copy and modify to pull results for your own purposes. You can also start from scratch and build your own report to meet your own needs.

All reports are listed in the left navigation menu in the U of M Tickets application. They are organized by category based on the main source of data in the report. Newly created reports that you make or are shared with you will also appear under their respective categories in the left navigation menu.

- Note: The reports listed in the **Standard Reports** category are pre-built
There are two ways to get started with using reports in TDX:

- Start by making a new report from scratch.
- Copy an existing report and then modify that report for your specific needs.

**Use Good Naming Conventions**

Body

All technicians have the ability to make reports in TDNext. These reports can then be shared with other groups or kept visible only to yourself. With the number of reports being created and used, please follow these recommendations for naming reports that you create:

- Start your report title with one of the following:
  - Technology
  - Service
  - Responsible Group (or common shortened name for your group)
  - Your initials or Internet ID
- Finish your report title with a concise phrase indicating the content or purpose of the report. For example:
  - OIT Service Desk New Ticket Count
- OIT Service Desk Reopened Tickets
- Canvas KB Article Inventory

Use the description field to include any additional details or instructions on how to use the report, change filters, etc. For example:

- **Title**: Editors: Check KB Article Links
- **Description**: Use this report to search for articles that link to another article. Copy and paste an article URL into the Body Like field, and click Run Report.

**Make a New Report**

**Body**

You can make a new report in TDX if none of the existing reports meet your needs. See [Understand the Reporting Function in TDX](#) for details on how to find existing reports in the tool.

**Making a new report**

1. Go to the U of M Tickets application, click on the **+Report** button, then click on **Report**.

   ![Report Button](image)

2. Select the type of report you would like to make.
   Note: Different report types provide different filters and parameters.

   - Knowledge Base Report
   - Location Rooms Report
   - Locations Report
   - Survey Response Report
   - Ticket Report
   - Ticket Tasks Report

3. **Name your report.** Keep in mind best practices for naming conventions.
4. **(Optional) Add a Description** for your report.
5. **Select the columns you would like to see** displayed in the report results.
   - You may add, remove, and reorder the columns to your liking.
6. **Add filtering to your report.** Modify the following fields as needed:
   - **Column:** Select a parameter you wish to report on.
   - **Operator:** Select an option to act on the data. The options available may change depending on the parameter you selected.
   - **Value:** Enter a specific value. The options available may change depending on the parameter and operator you selected.
   - *(Optional)* By default TDX will use ALL the filters you add into the filtering section. Click on the green **Show Advanced** button to set conditional filtering using AND/OR expressions.
     - For example, you want your report to filter on Filter 1 OR Filter 2 AND Filter 3. In this case the expression would be "(1 OR 2) AND 3".

7. **Order your report.**
   - You can select to order by any of the display columns you selected above in step 4.

8. **Set the maximum number of rows to retrieve.**
   - Depending on your data, you may need to adjust this number higher or lower than the default value.

9. *(Optional)* **Choose a report folder** (see [Organize Reports in Folders]).

10. **Set the visibility of the report.**
    - By default, reports you create will only be visible to you.
    - At your discretion, you can instead allow specific groups to view the report, or everyone in TDX.

11. *(Optional)* **Add a chart.**

12. Click **Save and Run.**
13. Review the results to confirm the report meets your expectations. If it doesn't, continue editing the report as necessary.

**Copy an Existing Report**

**Body**

There are many existing reports already available to you in TDX that might generate the type of information you need. You can copy one of these reports and modify the report for your own needs.

**Copying an existing report**

1. Navigate to the U of M Tickets tab at the top of the page.

2. Go to the left hand navigation menu and select the name of the report you'd like to view.
   - You can choose a report that someone else has made.
   - If the report name contains the word **Group's** or **Group**, that report serves as a template. You will need to copy and modify the report with your own group's information before running it to get any usable data.

3. Click **Actions** and select **Copy** from the drop-down menu. *The Copy Report window opens with an editable title field.*

4. Enter a **New Name** that signifies this is your own report. Keep in mind best practices for naming conventions.

5. Leave the **Copy Visibility Permissions?** box unchecked so it is not
automatically shared with everyone and is visible only to you. (You will be able to share your report to specific groups later.)

6. Click **Save** at the top of the window. *Another window opens asking if you want to view the new report, make another copy, or close the window.*

7. Select **View the New Report**. *The report settings will open in a new window.*

You will need to **modify your report** for your own purposes to make it useful to you.

**Modify Your Report**

**Body**

After you have **copied an existing report**, you will need to modify it for your own needs. You can also use these instructions to modify any original report you created.

**Modifying your report**

1. Go to the report you have copied or created.
2. Click on the **Actions** button, and select **Edit** from the drop-down menu.
3. Scroll down to the **Add filtering to your report** section.
4. Find the row that has the **Resp Group**
5. Make any other filter changes to customize the report for yourself.
6. Scroll down to the **Set the visibility of this report** section to make the report visible to other responsible groups.
   - **Note**: you cannot add individual names in this field.
7. *(Optional)*: **Add a Chart** to your report, if desired.
   - Click into the **Type** field and select the desired chart type. **Note**: Based on the chart type you select, there will be additional fields to customize the chart.
8. *(Optional)*: Choose how you want the report to appear on your desktop: **Grid** or **Chart**.
9. *(Optional)*: **Email Report Results to other Users**
10. Click **Save and Run** (at top) to see the results of your customized report.
11. Go back to the U of M Tickets app and press **Refresh**.
   - Scan the left navigation under the ticket reports lists. *The customized report you just made should be listed with the title you gave your report.*
   - Click your customized report and run it to see updated results.

**Manage Your Reports**

**Organize Reports in Folders**

**Body**
You can organize reports into folders in the U of M Tickets app for quick access to your commonly used reports.

**Organizing your Reports in Folders**

1. Navigate to the **U of M Tickets** tab at the top of the page.

3. Enter a **Name** for your report folder. Keep in mind best practices for naming conventions.
4. *(Optional): Enter a **Description** of your report folder.*
5. **Set the visibility of your report folder.**
   - **Just Me (default) means** only you will see your report folder.
   - *(Optional): **Set the visibility** to allow specific responsible groups to view the folder.*
6. Click **Save**.

**Search for a Report or Report Folder**

Body

You can easily search for reports that you or others have created.

**Searching for a Report or Report Folder**

1. Navigate to the **U of M Tickets** tab at the top of the page.
2. Click **Reports** in the top menu bar. The Reports page appears listing all the available report folders and reports.

3. Enter search criteria by keywords or report **Owner**.

4. Click **Search** in the top left.
   - Only reports that match the criteria will show in their respective folder(s).
   - You will still see all the other folders but they will be empty.

5. Click the report's **Name** to access it. The page refreshes. Except for the report option buttons at the top, the page will be blank.

6. Click the **Run Report** button.

   The page refreshes and displays records that meet the report's criteria.

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### Add a Report to a Report Folder

**Body**

You can add a report to a Report Folder while you are in the report.

#### Adding a report to a Report Folder

1. Go to your report.
2. Click the **Actions** button, and select **Edit** from the drop-down menu.
3. Scroll down to the section titled **Choose a Report Folder**.
4. Choose the desired **Folder** name from the drop-down menu.

![Choose a report folder]

5. Click **Save**.

**Export Report Results**

**Body**

Before a report can be exported to Excel, you must first run the report.

**Exporting report results**

1. Run the report.
2. Click the **Actions** button.
3. Select **Export to Excel**. *The report will download to your computer.*

![Actions, Run Report, Print]

4. Click the file download to open the report in .xlsx format.

**Share Your Reports**

**Share a Report**
You can share a report with other Responsible Groups. Sharing a report with other groups allows technicians within the group to run the report you created. Anyone who has access to the report can make a copy for themselves to modify and use. However, only the report owner can modify the original report.

**Sharing a report**

1. Go to the report you want to share.
2. Click the **Actions** button, and select **Edit** from the drop-down menu.
3. Scroll down to the section titled **Set the visibility of this report**.
4. Select the radio button for **Me and people in these groups**. A **text box** appears.

   ![Set the visibility of this report](image)

   - [ ] Just Me
   - [x] Me and people in these Groups
   - [ ] Do not show this report in the navigator (desktop module only)

5. Enter the name of the **Responsible Group** you want to share the report with.
6. Click **Save**.

**Email Report Results to Other Users**

You can email report results to other people, whether or not they have access to TDNext. You can also set up the report to run on a specific schedule and email the results to users with that schedule.

**Emailing report results to other users**

1. Go to the report.
2. Click the **Actions** button, and select **Show Details** from the drop-down menu. A Report Details window opens.

3. Click **Actions** in the Report Details window, and select **Add Delivery Schedule** from the drop-down menu. The Delivery Schedule window will open.

4. Click on the **Lookup** icon next to the Recipients field.

5. Click the **Both** radio button next to the search field.

6. Search for the user you would like the report to be emailed to.

7. Check the recipients' name in the search results and click **Insert Checked**. The search box closes and the Add Delivery Schedule window will have the user you selected listed in the Recipients field.

8. Set the report **Interval**, **Time**, and **Format** fields for what you need to send.

9. Select **Save**.

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**Change the Ownership of a Report**

**Body**

You can change the ownership of any report you own.

**Changing ownership of a report you own**

1. Click the **Actions** button, and select **Show Details** from the drop-down menu. A Report Details window opens.

2. Click **Actions** in the Report Details window, and select **Change Owner**.

3. Remove your own name and enter the name of the new report owner.

4. Click **Save**.

**Changing ownership of a report owned by a former employee**

If an employee who owned a report is no longer with the University, you can request to have the report ownership changed.

1. Submit a [TDX Service Request Form](#).

2. Under the **Request Details** section, select the **Other** option. A text box will appear where you can enter additional details.

3. 
Enter the following information:
- Name of the report
- Name and Internet ID of the new owner

Add a Report to a Desktop

**Body**

When you are creating or managing a desktop, you may want to add a report. Some existing reports may meet your needs. Others you may need to modify to generate data relevant to your Group.

**Adding a Report to a Desktop**

1. Go to the Desktop tab. See [Create and Manage a Desktop](#).
2. Click Edit Desktop. A new window opens for that Desktop.
3. Click **U of M Tickets** in the **Available Content** column. A list of available reports appears.
4. Find your desired report.
   - You can do a page find (Ctrl+F or Cmd+F) for the name of the report.
° You can also scroll through the list.
° You will find existing reports and those you have modified and renamed.

5. Drag the report to the desired column in the desktop window being edited.

6. Click **Save** before exiting the Edit Desktop tool.

7. Click **Refresh** on the Desktop page. *The report will populate.*