

## 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

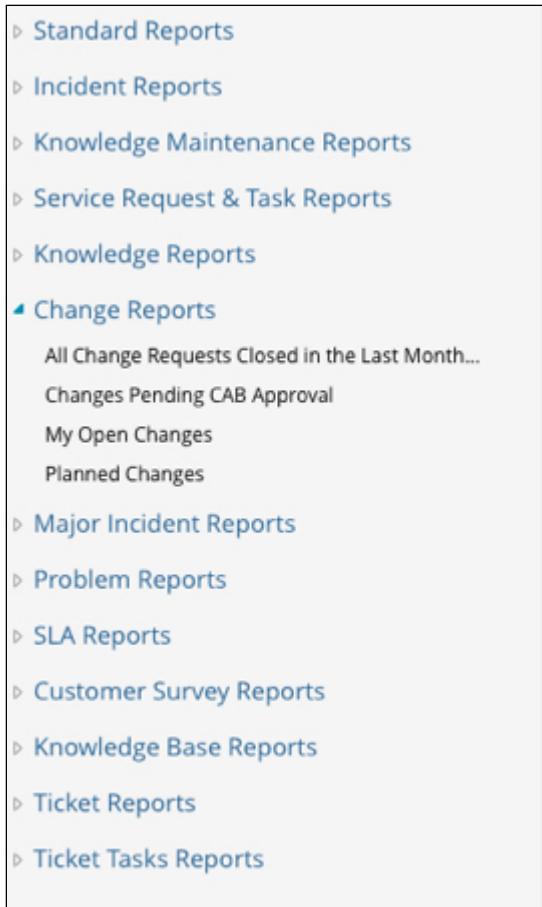
TDX comes with some pre-built reports which you can run right away. It also has many report templates that you can copy and modify to pull results for your own purposes. You can also start from scratch and build your own report to meet your own needs.

## Understanding the Reports Navigation Menu

Reports and report folders appear in the left-hand **Navigator** menu with the **Standard Reports** folder at the top. The folders are then organized by favorites, **Order** (a setting that can be changed when editing a folder), and finally

alphabetically by name. The report folders in the **Navigator** are named according to the data the report is sourced from (i.e., tickets, knowledge, problems, changes).

- Newly created reports that you make or are shared with you will also appear under their respective categories in the left navigation menu.
- Click on the report folder title to open up a submenu of all reports available in that folder.



## Using Standard Reports

The reports listed in the **Standard Reports** category are pre-built reports that are not modifiable. These report on all data in the U of M Tickets application in TDNext.

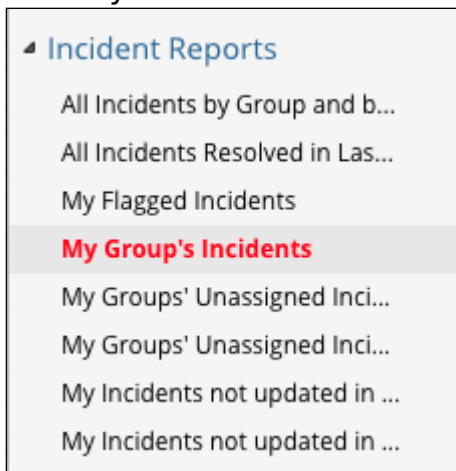


1. Select the name of the report in the Report Menu. *The Standard Report will load in the main page area.*
2. Select **Refresh** or **Run Report** at the top of the main page. *The report results will load in the main page area.*

## Using Reports Titled "My ..." and "My Groups ..."

There are a number of pre-built reports you can run to get current information based on your user name.

- These reports will be titled either "**My ...**" or "**My Groups ....**"
- Reports titled "**My Groups ...**" will include a report of items from ALL groups of which you are a member.



To run these reports,

1. Select the name of the report in the Report Menu. *The report will load in the main page area.*
2. Select **Run Report** at the top of the main page. *The report results will load in the main page area.*

- These report results are based on your user name and ALL user groups that you are a part of in TDX.

## Making Your Own Reports

There are two ways to get started with making your own reports in TDX:

1. Start by [making a new report](#) from scratch.
2. [Copy an existing report](#) and then [modify that report](#) for your specific needs.

All pre-built and customized reports can be placed on dashboards, downloaded, and shared with others. See the [Create and Manage Reports Self-Help Guide](#) for more information.

### 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.

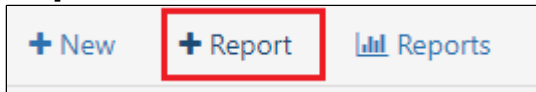
## Make a New Report

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**.



2. Select the type of report you would like to make.

Note: Different report types provide different filters and parameters.



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".

Add filtering to your report

Add

#	Action	Column	Operator	Value(s)	Options
1	<a href="#">Remove</a>	Subject	contains	servicenow	<input type="checkbox"/> Prompt
2	<a href="#">Remove</a>	Body	contains	servicenow	<input type="checkbox"/> Prompt
3	<a href="#">Remove</a>	Owning	is one of	T2 OIT Technology Training <span style="font-size: 0.8em;">🔍 ✖</span>	<input type="checkbox"/> Prompt

Hide Advanced

Specify advanced filtering syntax using parenthesis and the boolean operators **AND** and **OR**. Refer to a filtering condition by its number in the list.  
For example, "(1 OR 2) AND 3"

(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 5.

## 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) If you do not want the report to appear in the left-hand **Navigator** menu then check the **Do not show this report in the navigator (desktop module only)** checkbox.

- The report will still appear in the **Reports** 📊 Reports section.
- **Important:** Selecting this option means that other users of the report will not be able to change this setting for themselves. If you decide at a later time that you want to allow the report to show in the left-hand **Navigator** then the **Owner** of the report will need to uncheck this box.

12. (Optional) **Add a chart.**
13. Click **Save and Run.**
14. Review the results to confirm the report meets your expectations. If it doesn't, continue editing the report as necessary.

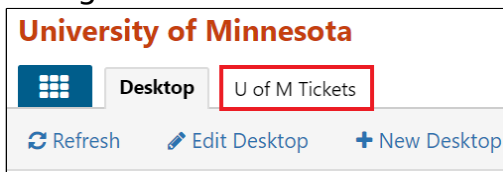
## Copy an Existing Report

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.

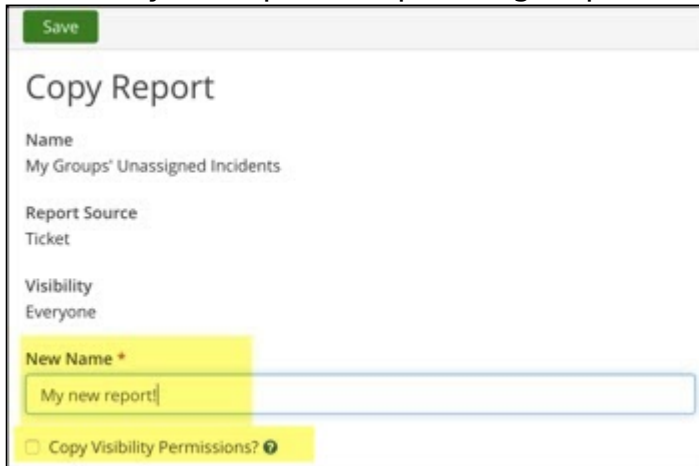


2. Go to the left hand navigation menu and select the name of the report you'd like to view.
  - You can choose a report that someone else has made.
  - If the report name contains the word **Group's** or **Group**, that report serves as a template. You will need to copy and modify the report with your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

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** field in it.
  - Click the **X** next to the current **Value(s)** field to delete the current setting.
  - Type the name of your own group, or use the **Lookup Field** to find the applicable Group name(s) for your report.

#	Action	Column	Operator	Value(s)
1	Remove	Status	is one of	New In Process Pending Response
2	Remove	Resp Group	is one of	ITSM Process Owners <input type="text"/> <input type="button" value="Q"/> <input type="button" value="X"/>
3	Remove	Classification	is one of	Incident Major Incident Problem

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.

## Organize Reports in the Navigator Menu

### Create a Report Folder

## Body

You can organize reports into folders in the U of M Tickets app for quick access to your commonly used reports. This article is part of the [Create and Manage Reports self-help guide](#).

Reports and report folders appear in the left-hand **Navigator** menu with the **Tickets** and **Standard Reports** folders at the top. The folders are then organized by favorites, **Order** (a setting that can be changed when editing a folder), and finally alphabetically by name.



## Creating Report Folders

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



2. Click on **+Report** and select **Report Folder** from the drop-down menu. *The New Report Folder window opens.*
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):* **Me and people in these Groups** to allow specific responsible groups to view the folder.

6. Click **Save**.

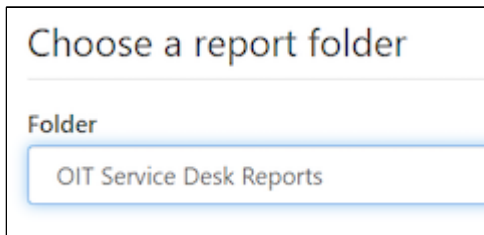
## Add a Report to a Report Folder

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.



The image shows a screenshot of a web interface. At the top, there is a title 'Choose a report folder'. Below this is a label 'Folder' and a dropdown menu. The dropdown menu is open, showing a list of options. The first option, 'OIT Service Desk Reports', is highlighted with a blue border, indicating it is the selected option.

5. Click **Save**.

## Favorite a Report Folder

Body


Favoriting a report folder will raise the folder to the top of the reports section in the **Navigator**, directly below the **Standard Reports**. Multiple favorited folders will be organized alphabetically. This article is part of the [Create and Manage Reports self-help guide](#).

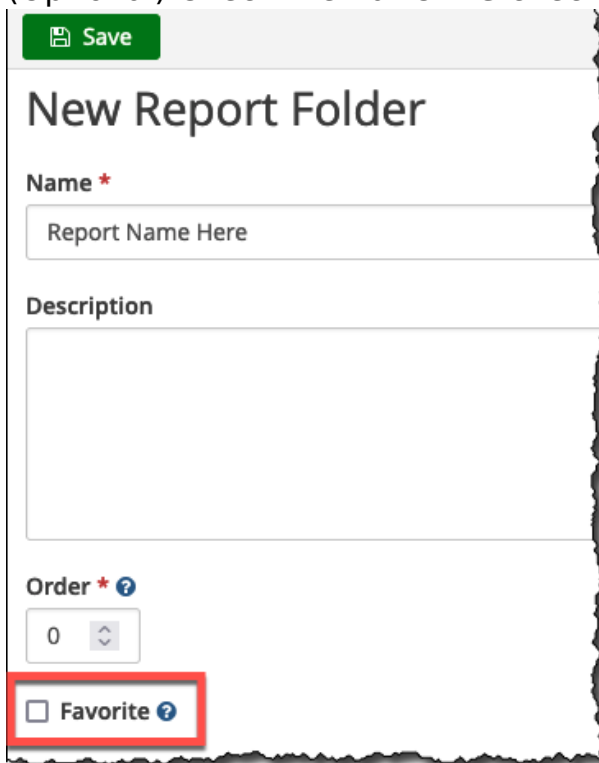
To set a folder as a favorite there are two methods:

1. [Setting a new folder as a favorite.](#)

2. [Setting an existing folder as a favorite.](#)

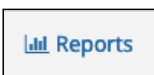
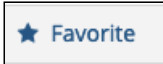
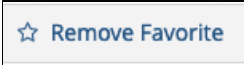
## Setting a New Folder as a Favorite

1. Click the **+Report** button . A dropdown menu will appear.
2. Select **Report Folder**.
3. Fill out the report name in the **Name** textbox.
4. (Optional) Add a description to the report in the **Description** textbox.
5. (Optional) Change the **Order** for the report folder.
  - a. Order defaults to 0 for all folders.
  - b. Report folders appear in the left-hand **Navigator** menu first by favorites, then Order, then name.
6. (Optional) Check the **Favorite** checkbox to add the folder to your favorites.



7. Click **Save**.

## Setting an Existing Folder as a Favorite

1. Click the **Reports**  button.
2. For the folder you want to favorite, click the **Favorite**  button.
3. To unfavorite a report, click the **Remove Favorite**  button.

## Choose Which Reports Appear in the Navigator





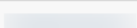
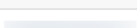
Body

You can choose which reports appear in the left-hand **Navigator** menu. This article is part of the [Create and Manage Reports self-help guide](#).

## Choosing Which Reports Appear in the Navigator

1. Click the **Reports**  button.

2. Check the **Show in Navigator** checkbox to show the report in the **Navigator**.

Test Report Folder									 Remove Favorite	 Edit Folder	 Delete Folder
Name	Source	Visibility	Owner	Last Run	Last Run By	Details	Delete	Show in Navigator			
First Example Report	Ticket Tasks	Owner				<a href="#">Details</a>	<a href="#">Delete</a>	<input type="checkbox"/>			
Second Example Report	Ticket	Owner				<a href="#">Details</a>	<a href="#">Delete</a>	<input checked="" type="checkbox"/>			
Third Example Report	Ticket	Owner				<a href="#">Details</a>	<a href="#">Delete</a>	<input type="checkbox"/>			

o In this example image:

- The **First Example Report**'s box is unchecked so the report will not show in the Navigator.
- The **Second Example Report**'s box is checked so it *will* show in the Navigator.
- The **Third Example Report**'s box is unchecked and grayed out. This report will not show in the Navigator, and to allow it to be shown in the Navigator the Owner of the report will need to edit the report and uncheck the **Do not show this report in the navigator (desktop module only)** option.

3. 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

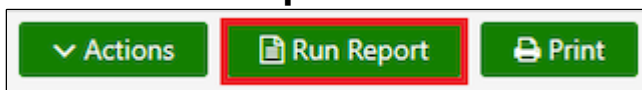
1. Navigate to the **U of M Tickets** tab at the top of the page.



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.
  - o 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.

Name	Source	Visibility	Owner	Last Run	Last Run By	Details	Delete	Show in Navigator
Articles Owned by Individuals Instead of a Group	Knowledge Base	2 Groups	Jack Willis	Thu 8/20/20 2:58 PM	Steve Aker	Details		<input checked="" type="checkbox"/>

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.*

## Share Your Reports

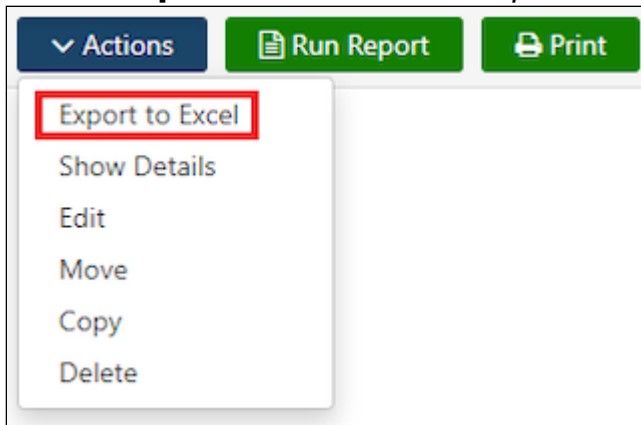
### Export Report Results

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.*



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

### Share a Report

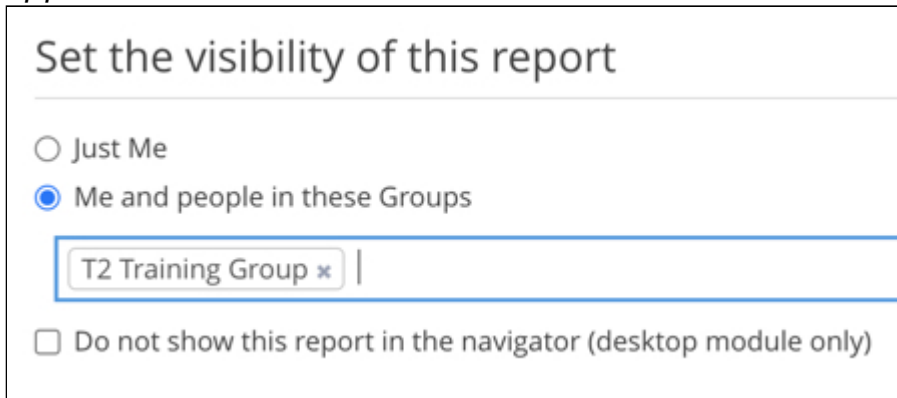
Body

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

Just Me

Me and people in these Groups

T2 Training Group x |

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

### Body

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**.

## 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.
  1. If an individual, enter their Internet ID
  2. If a group, enter the group name (available after TDX Release 11.6, 12/3/22)
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
  - New owner
    - If an individual, provide both Name and Internet ID
    - If a group, provide the full name of the group (available after TDX Release 11.6, 12/3/22)

## Add a Report to a Desktop

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=5400>