

# (Formerly GetHelp) Version 8.1 Release Documentation

Frontline Education is happy to announce the release of Help Desk Management version 8.1 which includes the following enhancements:

## 1. Enhanced Reporting - Customize Reports in Analytics

Help Desk Customize Reports

Being able to manipulate data for reporting, add fields, and customize views offers unparalleled flexibility and precision in data analysis. This capability allows you to tailor reports to meet specific business needs, ensuring that critical insights are easily accessible and actionable.

- By adding fields, you can incorporate additional data points that provide a more comprehensive understanding of your operations.
- Customizing views enhances the clarity and relevance of the information presented, enabling stakeholders to focus on the most pertinent data.

Overall, these features empower you to make more informed decisions, drive efficiency, and adapt quickly to changing business requirements.

## Help Desk Analytics Overview

Help Desk Analytics offers customers the ability to track and report on metrics important to the district. Help Desk currently offers 12 canned reports for admin/technicians:

- <u>% of tickets within SLA (First Response)</u> This report shows the percentage of tickets where the initial response from support was provided within the defined SLA, indicating the team's responsiveness. It helps gauge the efficiency of your team in acknowledging customer concerns promptly, ensuring a positive customer experience.
- 2. <u>% of tickets within SLA (Resolution) -</u> This report indicates the percentage of tickets that were resolved within the SLA timeframe, reflecting the team's ability to meet service level agreements. It measures the team's effectiveness in resolving issues within the expected timeframe, indicating operational efficiency and customer satisfaction.
- Average Open Time This metric calculates the average duration that tickets remain open before being resolved or closed, helping identify areas for improved efficiency. It provides insight into the average duration tickets remain unresolved, helping identify bottlenecks and improve response times.
- 4. <u>Average Resolution Time -</u> This report calculates the average time taken to resolve tickets, providing insights into the team's efficiency and performance. It shows the average time taken

to resolve tickets, aiding in setting realistic expectations for issue resolution and improving overall service levels.

- 5. <u>Tickets Resolved by Week -</u> This report presents the number of tickets resolved each week, allowing for trend analysis and workload planning. It offers a weekly overview of ticket resolutions, helping track team productivity and identify trends over time.
- 6. <u>Tickets Resolved to Date by Technician</u> This report shows the total number of tickets resolved by each technician, helping to measure individual performance and workload. It tracks individual technicians' performance in resolving tickets, enabling targeted training and resource allocation.
- 7. <u>Total Daily Tickets Opened by Technician</u> This report details the number of tickets opened by each technician on a daily basis, aiding in workload management. It provides a daily breakdown of tickets opened by each technician, aiding in workload distribution and resource planning.
- 8. <u>Total Daily Tickets Resolved by Technician -</u> This report shows the number of tickets resolved by each technician daily, providing insights into individual productivity. It offers insights into individual technicians' performance and efficiency.
- **9.** <u>Total Hours Entered by Technician -</u> This report tracks the total hours spent by each technician on ticket resolution, aiding in resource allocation and performance evaluation. It tracks the hours spent by each technician on ticket resolution, aiding in resource management and project planning.
- Total Tickets by Service Group This report categorizes tickets by service group, providing insights into which areas of support are experiencing the highest volume. It categorizes tickets by service group, helping identify areas of high demand or recurring issues for targeted improvement efforts.
- 11. <u>Total Tickets by Site -</u> This report categorizes tickets by site or location, helping to identify patterns and trends specific to each site. It categorizes tickets by site, enabling site-specific performance analysis and resource allocation.
- Total Tickets Opened by Product Type This report categorizes tickets by the type of product or service, enabling analysis of common issues and areas for product improvement. It categorizes tickets by product type, aiding in identifying common issues and prioritizing product improvements.

Dashboard Ticke	ts ▼ Parts ▼ Knowledge Base ▼ Analyti	cs			6	😧 🌣 Ac	dmin 🔻 🄇	9 AnnaMaria Gallozzi 🔻
Create Ticket	Create Article					Q Sea	arch	Search
Analytics	<ul> <li>Please select a report System Reports</li> <li>% of Tickets Within SLA (First Response)</li> <li>% of Tickets Within SLA (Resolution)</li> <li>Average Open Time</li> <li>Average Resolution Time</li> <li>Tickets Resolved by Week</li> <li>Tickets Resolved by Week</li> <li>Tickets Resolved by Vechnician</li> <li>Total Daily Tickets Opened by Technician</li> <li>Total Daily Tickets Opened by Technician</li> <li>Total Tickets by Service Group</li> <li>Total Tickets by Site</li> <li>Total Tickets Opened by Product Type</li> <li>My Reports</li> </ul>	Date Range:	Start Date	ne v	E Run			

#### **User Management: Roles**

Admins have permissions to view and pull reports from the Analytics page. Admins can determine which technicians have permissions to view the Analytics page and run reports.

Analytics Permissions

🗹 View Analytics Page

#### **Steps to Edit Permissions for Analytics in User Roles:**

- 1. Login as an Service Admin
- 2. Navigate to the top of the application and locate the "Admin" drop-down menu.
- 3. From the Admin drop-down, select "User Management" to access further options.
- 4. Within the User Management options, select "Roles" to proceed to the permissions editing interface.

**NOTE**: The Default Service Technician Role now includes Analytics permissions by default. For preexisting roles, administrative action is suggested to enable Analytics Permissions.

#### Analytics

1. On the top navigation, navigate to the Analytics page.

Dashboard Ticke	ets • Parts • Knowledge Base • Ana	lytics			
Create Ticket	Create Article				
Analytics	Please select a report	~	Date Range:	Start Date 🖬 E	Ind Date 🛱 Run 🔻

Note: If the user does not have permissions to view Analytics, the Analytics button will not be present.

Dashboard Ti	skets ▼ Knowledge Base ▼
Create Ticket	Create Article

Note: If a restricted user receives a link to a report of the Analytics page and does not have access, an error message will appear.



- 2. Once successfully on the Analytics page, you can run the 12 canned reports the same way as before. Simply choose from the drop-down of reports, create a custom date range or choose a predefined time frame.
- 3. Once Date Range/Time Frame options have been selected, click the Run button and your report will display on the page. For more information about how to run a canned report, please review this <u>Learning Center Article.</u>
- 4. With a report now displayed on the page, there will be 3 new icons on the right side above your report.

Analytics % of Tickets Within SLA	(Resolution)	~	Date Range:	2/1/2024 Time Frame	5/24/2	024	Run				
Grid Charts Format Export										Options	Fields Fullscreen
			% of Tickets V	/ithin SLA (Resolut	on)						
1	2	3	4	5	6	7	8	9	10	11	12
1 PROBLEM TYPE	Total Tickets	Total Tickets Within SLA	Total Tickets Out of SLA	Percentage Within							
2 Technology	2	2	0	100							
3 Technology > Equipment > Chromebook > CB Broken Screen	1	1	0	100							
4 Technology > Equipment > Chromebook > CB Charging Issue	5	; 1	4	20							
5 Technology > Classroom Assets	1	1	0	100							
6 Technology > Form Template	1	1	0	100							
7 Security	1	1	0	100							
8											
9											
10											
11											
12											

a. Options (gear icon) - customize layout options for the grid report

## • Grand Totals:

- Do Not Show Grand Totals This option hides the grand totals for the entire dataset.
- Show Grand Totals This option displays the grand totals for both rows and columns.
- Show for Rows Only This option shows the grand totals only for rows.
- Show for Columns Only This option shows the grand totals only for columns.

## • Subtotals:

- Do Not Show Subtotals This option displays subtotals for grouped data in both rows and columns.
- Show Subtotals This option displays subtotals for grouped data in both rows and columns.
- Show for Rows Only This option shows subtotals only for grouped rows, not for columns.
- Show for Columns This option shows subtotals only for grouped columns, not for rows.
- Layout:

- Compact Form A space-efficient layout where data is displayed in a condensed manner.
- Classic Form A traditional layout that presents data in a familiar tabular format.
- Flat Form A layout where data is presented in a flat, ungrouped manner.

Layout options	CANCEL
GRAND TOTALS	SUBTOTALS
Do not show grand totals	Do not show subtotals
Show grand totals	Show subtotals
Show for rows only	Show for rows only
Show for columns only	Show for columns only
LAYOUT	
Compact form	
Classic form	
Flat form	

b. Fields (table icon) - customize fields for the grid report

By configuring these sections, you can create a detailed and customizable view of your data, allowing for better analysis and understanding of the underlying patterns and trends. The fields on the left can be dragged to the quadrants on the right. They can be re-arranged, and different values can be calculated.

ields	Add	d calculat	CANCEL	APPLY
ag and drop fields to arrange				
All fields Collapse all	Report filters		Columns	
Manufacturer			$\Sigma$ Values	
Percentage Within				
Problem Type				
Problem Type UID				
Product Type				
Site				
SLA Target Type UID	Pouro		Voluce	
Technician	Problem Type		Total Tickets	Σ~ Ξ
✓ Total Tickets			Total Tickets Within SLA	$\Sigma^{\vee} \equiv$
Total Tickets Out of SLA			Total Tickets Out of SLA	$\Sigma^{\vee} \equiv$
Total Tickets Within SLA			Percentage Within	/ =
<ul> <li>Calculated values</li> </ul>				
Percentage Within				

#### • Rows:

- The "Rows" section determines how the data is grouped horizontally in your chart or table. Each unique value in the fields you place here will be represented as a separate row.
- Example: If you place "Week Of" in the Rows section, each row in the table will represent a different week.

#### • Columns:

- The "Columns" section determines how the data is grouped vertically in your chart or table. Each unique value in the fields you place here will be represented as a separate column.
- Example: If you place "Technician" in the Columns section, each column will represent a different person or entity who resolved the issues.

## • Values:

- The "Values" section is used to specify what data is being measured or calculated. This section typically contains numeric data that you want to aggregate, such as sums, averages, counts, etc.
- Example: If you place "Resolutions" in the Values section and choose to sum them, you will get the total number of resolutions for each combination of rows and columns.

## • Report Filters:

- The "Report Filters" section allows you to filter the entire dataset based on certain criteria. The fields placed here can be used to refine the data displayed in the chart or table by excluding or including certain values.
- Example: If you place "Manufacturer" in the Report Filters section, you can filter the chart to show data for specific manufacturers only.

## The Additional Fields that can be modified in this section are:

- Site Each ticket can have a site associated to it, allowing technicians and admins to look at ticket trends across sites.
- Product Type is a field that comes over from Asset Management when a tag is associated to a ticket, allowing technicians and admins to track inventory ticket trends
- Manufacture is a field that comes over from Asset Management when a tag is associated to a ticket, allowing technicians and admins to track inventory ticket trends
- Technician the heart and soul of the help desk system, technicians are tracked and measured by their KPI's
- Problem Type customizable fields that can help show trends of needs as tickets come in.
- Service Group the ability to track what service group tickets are doing and how they are performing.

**NOTE:** Service Group Fields are only able to be added on Total Tickets by Service Groups canned reports. This report will allow you to manipulate all the data but other reports do not support the Service Group fields.

c. **Calculated Value**- The "Calculated Value" feature allows you to create custom metrics by applying mathematical and logical operations to your data fields. This enables a deeper analysis by generating specific insights tailored to your needs, such as combining, comparing, or transforming existing data points. Utilizing calculated values enhances your reporting capabilities, providing more precise and meaningful metrics for informed decision-making.

Calcu	ulated	valu	е		CANCE	EL	AP	PLY
Value								
All fie	lds							Q
Manu	facturer	(Count	t)				$\Sigma \sim$	=
Perce	ntage V	Vithin (N	No calcu	lation)				=
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Proble	em Type	e (Coun	t)				$\Sigma^{\sim}$	
Proble	em Type	e UID (S	Sum)				$\Sigma^{\sim}$	
Ca	lculate	individu	ial value	ès				
+	-	×	÷	^	=	<	>	≤
≥	!=	OR	AND	IF	ABS	RD	MIN	MAX
		Drop	values a	and edi	t formula	a here		

d. Full Screen - enlarge your report to cover your full desktop screen.

When the report is in full screen, the right corner will then show a minimize button to return to the default page view.

Grid Charts Format Export											Options Field	비 지 Minimize		
% of Tickets Within SLA (Resolution)														
1 2 3 4 5 6 7 8 9 10 11 12 13														
1 PROBLEM TYPE	Total Tickets	Total Tickets Within SLA	Total Tickets Out of SLA	Percentage Within										
2 Technology		5 5	; 0	100										
3 Technology > Equipment > Chromebook > CB Broken Screen		1 1	0	100										
4 Technology > Equipment > Chromebook > CB Charging Issue	1	. 6	5 4	60										
5 Technology > Classroom Assets		1 1	0	100										
6 Other		1 2	2	50										
7 PType 0301		3 2	1	66.67										
8 Technician Tickets > Project Requests			1	0										
9														
10														
11														
12														
13														
14														
15														

e. **Format** - format has been moved from the right side to the left side of the analytics screen. The same conditional formatting and cell formatting is available.

Analytics % of Tickets Within	n SLA (Resoluti	on)	<b>~</b> C	eate Range:	Start Dat	e 🗎	End Date	•	Run 👻					
Grid Charts Format sport													Options	Fields Fullscreen
Fig         Format cells         % of Tickets Within SLA (Resolution)           PERCENTAGE         Image: Conditional formating         Conditional formating														
1 PROBLEM TYPE	2 Total Tickets	3 Total Tickets Within SLA	4 Total Tickets Out of SLA	5 Percentage Within	6	7	8	9	10	11	12	13	14	15
2 Technology	5	5	c	100										
3 Technology > Equipment > Chromebook > CB Broken Screen	1	1		100										
4 Technology > Equipment > Chromebook > CB Charging Issue	10	6	4	60										
5 Technology > Classroom Assets	1	1		100										
6 Other	4	2	2	50										
7 PType 0301	3	2	1	66.67										
8 Technician Tickets > Project Requests	1	0	1	0										
9														
10														
11														

## Building & Saving a New Report

Chrome File Edit View History Bookmarks Profiles Tab Wind	ow Help O 💿 🧕		ay 28 4:30 PM
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← → C <sup>25</sup> frontlinesd.gethelphss.com/Ul/dashboard			nish update
Dashboard Tickets * Parts * Knowledge Base * Analytics		👗 💡 🌣 Admin 👻 😝 AnnaMaria Ga	allozzi 🔻
Create Ticket		Q Search S	earch
Unassigned Tickets	My Tickets	All Tickets	
Contidual Medium 71 High	53 Medium	Lowridal Afgh Agh Medum	
Sort By *	Status	Show All Problem Types 💌	
Buildings & Grounds > HVXC Service         Due In: 01d 08h 28m           > HVXC Maintenance         5/30/2023 Medium HVAC Maintenance Issue           2573         © 12/15/2023         ● Medium           Image: Comparison of the image of the imag	Technology           Test Email           2756         © 0-04/23/2024           Image: Close	Tachnology > Equipment > Chromebook > CB Charaina Issue           1/11/2024 Medium CB Charging Issue Issue           2875         © 01/11/2024           Image: Close	
Technology > Equipment > Overdue: 08d 03h 14m Chromebook > CB Charaina Issue need a new charger	Technology > Equipment >         Overdue: 08d 06h 30m           Chromebook > CB Broken Screen         5/2/2024 Medium CB Broken Screen issue email           2729         0/05/02/2024	Technology > Equipment > Overdue: 09d 23h 06m Chromebook > CB Charajna Issue need a new charger	
C2 2/70 C Vajv2/2024 V Medium	C ADDrove/Denv	A Approve/Denv	
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The video above shows the steps for how to build and save a new report.

1. From the Analytics page, choose the canned report that is most aligned with your reporting needs.

2. Choose your timeframe using either a custom date range or a predetermined timeframe.

← → C 25 frontlinesd.gethelphss.com/Ul/analytics	۹ 🖈 👻 🗖	) G 🔹 🛄 🖸 I 🖪	Paused Finish update :
Dashboard Tickets - Parts - Knowledge Base - Analytics		🍦 😧 🌣 Admin 👻	🕒 AnnaMaria Gallozzi 🔻
Create Ticket Create Article		Q Search	Search
Analytics Tickets Resolved by Week	Date Range: Start Date 🔁 End Date 🛱 Run 🔹 V Time Frame Today Yesterday This Week	]	Options Fields Fullscreen
1         2         3         4         5         6           1	7 8 Last Week 11 12 This Month Last Month This Quarter Last Quarter This Year All Time	13 14	15 16

3. After the date range is selected, click the green "Run" button. The canned report will populate on the Analytics page in a grid.

	Analytics	Tickets Res	solved by Weel	k	✓ Date Ra	nge:	Start Date	End Da	ite 🛱	Run 👻			
						0	This Quarte	r	~				
	Grid Charts Form	at Export										Options	Fields Fullscreen
						Tickets Res	olved by Week						
	1	2	3	4	5	6	7	8	9	10	11	12	13
1		RESOLVED BY 🔻 🌣											
2	WEEK OF	AnnaMaria Gallozzi	general user	thippa ch	Total Count of Tickets								
3	03/31/24 - 04/06/24		2	0	2								
4	04/07/24 - 04/13/24		1 0	0	1								
5	04/14/24 - 04/20/24	0	0 0	0	0								
6	04/21/24 - 04/27/24		1 0	0	1								
7	04/28/24 - 05/04/24		0 0	1	1								
8	05/05/24 - 05/11/24	(	0 0	0	0								
9	05/12/24 - 05/18/24		0 0	0	0								
10	05/19/24 - 05/25/24		0 0	0	0								
11	05/26/24 - 06/01/24		0 0	0	0								
12	Grand Total	3	2 2	1	5								

4. Modify and choose additional fields for your report by clicking the new Fields button on the top right of your report.

leius	Add calcu	lated value	CANCEL	APPLY
Drag and drop fields to arrange				
All fields	Report filters		Columns	
	Problem Type		Resolved By	
Manufacturer			∑ Values	
Original Week Values				
✓ Problem Type			Drop field he	
Product Type	Rows		Values	
Resolution Count $\Sigma \equiv$	Week Of		Sum of Resolutions	$\Sigma^{\vee} \equiv$
✓ Resolutions $\Sigma \equiv$				
Resolved By				

5. Once the fields are applied, the report will update on the page. In the grid, you can also highlight fields you want summed, averaged, or counted which will show at the bottom of the grid in grey highlight.

0	Create Ticket	Create Article								Q	Search		Search
,	Analytics	Tickets Res	olved by Week	<	✓ Date Ran	nge:	Start Date	End Date	e 👘	Run 🔻			
	Grid Charts Form	nat Export										Options	Fields Fullscreen
						Tickets Res	olved by Week						
P	ROBLEM TYPE ALL 🕸												
	1	2	3	4	5	6	7	8	9	10	11	12	13
1		RESOLVED BY 🝸 🌣											
2	WEEK OF	AnnaMaria Gallozzi	general user	thippa ch	Total Count of Tickets								
3	03/31/24 - 04/06/24	0	2	0	2								
4	04/07/24 - 04/13/24	1	0	0	1								
5	04/14/24 - 04/20/24	0	0	0	0								
6	04/21/24 - 04/27/24	1	0	0	1								
7	04/28/24 - 05/04/24	0	0	1	1								
8	05/05/24 - 05/11/24	0	0	0	0								
9	05/12/24 - 05/18/24	0	0	AVERAGE: 0.30	0 COUNT: 20 SUM: 6.00								
10	05/19/24 - 05/25/24	0	0	0	0								
11	05/26/24 - 06/01/24	0	0	0	0								

- 6. When the report is set as you want, you will have the option to see the data in a different chart type by clicking the Charts button at the top left of your report.
  - Column
  - Bar
  - Line
  - Scatter
  - Pie
  - Stacked Column
  - Column Line

Dashboard Tickets -	Parts ▼ Knov	vledge Base 🔻	Analytics					<b>0</b> <b>A</b> (	🤉 🌣 Admin	🔹 😑 Anna	Maria Gallozzi 🔻
🗘 Create Ticket 🖹 Cre	ate Article							Q	Search		Search
Analytics	Tickets Resolve	d by Week	~	Date Range:	Start Date	End Da	te 👘	Run 🔻			
Grid Charts Format E	sport									Options	Fields Fullscreen
Column				Tickets	Resolved by Week						
PROBI											
Line	2	3	4	5 6	7	8	9	10	11	12	13
1 2 WE Scatter	V DBY ∓¢ Gallozzi gene	ral user thinna d	th Total Cour	t of Tickets							
3 03/3 🖉 Pie	0	2	0	2							1
4 04/1 Stacked column	1	0	0	1							
5 04/1 🖾 Column line	0	0	0	0							
6 04/2 Multiple values	1	0	0	1							
7 04/2	0	0	1	1							
8 05/05/24 - 05/11/24	0	0	0	0							
9 05/12/24 - 05/18/24	0	0	0	0							
10 05/19/24 - 05/25/24	0	0	0	0							
11 05/26/24 - 06/01/24	0	0	0	0							

Below is an example of the bar chart option, showing how dynamic a report can be after the raw data is configured.

anarytics	TICKETS RESU	ived by week	~	Date Range:	0	This Quarter	End Date	Run	•		
	ſĥ				_					Ę	) II. 5-
rid Charts Format	Export									Opti	ons Fields Fullsc
				Tic	kets Res	solved by Week					
Sum of Resolutions	~							Wee	ek Of 🔻 🏚 Res	solved By 🔻 🏟	Problem Type 🎄
02/24/24 04/06/24											
03/31/24 = 04/00/24											
04/07/24 - 04/13/24											
04/14/24 - 04/20/24											
04/21/24 - 04/27/24											
04/21/24 - 04/2//24				0.0	0.0						
0	0.3	2 (	J.4	0.6	0.8	1 Sum of Resoluti	ons 1.2	: 1	.4 1	0.0	.8
AnnaMaria Gallozzi	🔵 general user 😑	thippa ch									

You can take the data a step further by using conditional formatting, click on Format to see options, to set values and format text sizes/fonts. Formatting cells can provide you with the ability to set the data set up with special requirements.

Analytics % of Tickets Within	n SLA (Resoluti	on)	<b>~</b> C	ate Range:	Start Da	ie 🗎	End Date	-	Run *					
Grid Chais Format Export													Options	Fields Fullscreen
Format cells				% of Ticke	ts Within SLA	(Resolution)								
PERCENTAGE VI														
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
1 PROBLEM TYPE	Total Tickets	Total Tickets Within SLA	Total Tickets Out of SLA	Percentage Within										
2 Technology	5	5	(	100										
3 Technology > Equipment > Chromebook > CB Broken Screen	1	1		100										
4 Technology > Equipment > Chromebook > CB Charging Issue	10	6	4	60										
5 Technology > Classroom Assets	1	1		100										
6 Other	4	2	2	50										
7 PType 0301	3	2	1	66.67										
8 Technician Tickets > Project Requests	1	0	1	0										
9														
10														
11														
1														

Your options to change formatting is shown below, whether you want to change cells or add conditional formatting, our options allow you to set the report how you see fit.

Format cells	CANCEL	APPLY	Cond	itional formattin	natting + CANCEL APPLY					
CHOOSE VALUE	Choose value	~								
Text align	right	~	Value:	Percentage Within $\vee$	Greater than or $\vee$	100				
Thousands separator	(Space)	~				×				
Decimal separator		~	Format:	Arial V	12px ~ A	73.93				
Decimal places	None	~								
Currency symbol			Value	Percentage Within V	Less than	75				
Negative number format	-1	~	value.	r oroontage triaint		×				
Null value			Format:	Arial $\lor$	13px ~ A	73.93				
	false									

Based on the conditional formatting applied above, you can see my SLA targets are highlighted red when below an acceptable SLA, and green when the team is hitting the mark.

Ē	Analytics % of Tickets Within !	SLA (Resolutio	on)	▼ Da	ate Range:	Start Date	rter	End Date	<b>*</b>	Run -	
	and Charts Format Export				% of Ticket	s Within SLA (	Resolution)				
	1	2	3	4	5	6	7	8	9	10	1
1	PROBLEM TYPE	Total Tickets	Total Tickets Within SLA	Total Tickets Out of SLA	Percentage Within						
2	Technology	5	5	0	100						
3	Technology > Equipment > Chromebook > CB Broken Screen	1	1	0	100						
4	Technology > Equipment > Chromebook > CB Charging Issue	10	6	4	60						
5	Technology > Classroom Assets	1	1	0	100						
6	Other	4	2	2	50						
7	PType 0301	3	2	1	66.67						
8	Technician Tickets > Project Requests	1	0	1	0						
9											
10											
11											
12											

**NOTE:** When a report has conditional formatting, it can be saved with the formatting.

#### Saving a Report

After running and manipulating a report as an admin or a technician, you can save the report by clicking the green arrow next to the run button. To Save a new report, click "Save As", to save edits to an existing report click "Save," and to delete a previously saved report click "Delete."

NOTE: All reports can be saved, and if you do not save a report, the filters/fields you have added will not be saved. Saving a report is the only way to ensure your edits are visible the next time you run the report.

Dashboard Tickets - Parts - Knowledge Base - Analytics	0 🌲 🕢 🌣 Admin 👻 🔒 AnnaMaria Gallozzi 📼
Create Ticket E Create Article	C Search Search
Analytics Hours by Tech by Product Type	End Date E Run Run Save Save Save As Delete Entered By © Product Type © Ticket Number ©
ArmaMaria Galozzi	
Leo Sho 0 1 2 3 4 5 Time Entered (Hours)	6 7 8 9 10 11
Acer Chromebook Chromebook HNAC	

When clicking "Save As", the pop-up below will prompt you to name the report you are working on by saying "What would you like to name this report?". You have an open text field to name the report up to 100 characters (including spaces).

Dashboard Tickets - Parts - Knowledge Base - Analytics		🌒 🌲 😧 🌣 Admin 👻 😝 AnnaMaria Gal	llozzi -
O Create Ticket B Create Article		C Search	Search
Analytics Hours by Tech by Product Type	Date Range: Start Date E End Date E Run -		
Grid Diarts Format Export		Options Fields F	
Time Entered (Hours)	X What would you like to name this report?	Entered By 🕸 Product Type 🕸 Ticket Numbe	r 🌣
ArraMaria Galazzi	* Report Name: Hours by Tech by Problem Type		
Leo Shra	Save Cancel		
0 1 2 3	4 5 6 7 8 Time Entered (Hours)	9 10	11
Acer Chromebook Chromebook HWAC			

When the report is saved, you can find it under "My Reports" in the "Please select a report" drop-down.

Note: Only YOU can see the reports you save under my reports. Reports that you build cannot be shared natively in Help Desk, but you can export the report to share.

Dashboard Tickets -	Parts - Knowledge Base - Analytics							
Create Ticket	E Create Article							
Analytics	<ul> <li>Please select a report</li> <li>System Reports</li> <li>% of Tickets Within SLA (First Response)</li> <li>% of Tickets Within SLA (Resolution)</li> <li>% verage Open Time</li> <li>Average Resolution Time</li> <li>Tickets Resolved to Date by Technician</li> <li>Total Daily Tickets Opened by Technician</li> <li>Total Daily Tickets Resolved by Technician</li> <li>Total Tickets by Service Group</li> <li>Total Tickets by Site</li> <li>Total Tickets by Site</li> <li>Total Tickets by Site</li> <li>Total Tickets by Site</li> <li>My Reports</li> <li>% of SLA's with formatting</li> <li>Hours by Tech by Product Type</li> </ul>	Date Range:	•	Start Date Time Frame	8	End Date	Ci	Run

## Examples of Useful Reports YOU Can Build

#### **1.** Resolution Time By Campus

Tracking Resolution Time by Campus for technicians enables precise identification of performance gaps and resource needs, ensuring consistent service quality across all locations. This data-driven approach enhances accountability and supports proactive issue management. By leveraging these insights, districts can optimize operational efficiency and maintain high standards of technical support.

Scenario: As an admin, I want to generate a report showing resolution time for tickets by campus, so that I can assess the efficiency of support services for each campus.

Analytics	Average Resolution	lime	~	D	ate Range:	Start I	Date 🛱	End Date	Rur	•				
Grid Charts Format E	xport											C	ptions Fields	Fullscreen
					Ave	rage Resoluti	on Time							
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
SITE 0	Average Days To Resolve													
2 Blank	111													
3 Cypress Creek Middle-High	259													
4 Learning Campus	219													
5 Grand Total	174													
6														
7														
8														
9														
10														
11														
12														

By adding the site field to the rows, I am able to see how each sites tickets are closed differently.

Fields		Add ca	alculated value	CANCEL AF	PLY
Drag and drop fields to	arrange				
All fields Expand all		Report filters		Columns	
Created Date	=			> Values	
Days	$\Sigma \equiv$				
Hours	$\Sigma \equiv$				
Manufacturer	-				
Minutes	$\Sigma \equiv$	Rows		Values	
Problem Type	=	Site		Average Days To Re	/ =
Product Type					
Resolved Date					

You can also change the Format view of this data to a pie chart, for example, to see the equity of resources across sites.

Analytics Average Resolution Time   Date Range: Start Date  End Date  Run   Cond Charts Format Export	Options Fields Fullscreen
Average Resolution Time	
Average Days To Resolve $\vee$	Site 🎄
Learning Campus (219) Cypress Creek Middle-High (259)	
\varTheta Blank: 🔍 Cypress Creek Middle-High 单 Learning Campus	

## 2. SLA time to respond by technician

The SLA time to respond by technician report tracks the response time for each technician against the defined SLA. This report helps ensure individual accountability and highlights areas where specific technicians may need additional training or support to improve their response times. It ultimately aids in maintaining high service standards and enhancing overall customer satisfaction.

Scenario: As an Admin, I want to see if my technicians are upholding the SLA's we have in place. In order to that, you can use the following steps:

Remove the Problem Type field (if you want, you can also get some interesting data having both Problem Type and Technician in the report) and set your values and columns how you see fit.

Fields	Add calculated value	Je 📰 CANCEL APPLY
rag and drop fields to arrange		
All fields Expand all	Report filters	Columns
Manufacturer		∑ Values
Percentage Within $\Sigma \equiv$		
Problem Type	Drop field here	Drop field here
Problem Type UID 🛛 🛬		
Product Type	Rows	Values
	Technician	Total Tickets $\Sigma^{\vee} \equiv$
Site		Total Tickets Wit $\Sigma^{\vee} \equiv$
SLA Target Type 2		Total Talata Out
Technician	Drop field here	Total Tickets Out $\Sigma^{\vee} \equiv$

Once Technician is added as a row, you will be able to see SLA data broken down by Technician.

A	Analytics	% (	of Tickets Within SLA (	(Resolution)	~	Da	te Range:	Start Da	uarter	End Da	te É	Run -					
Gr	Image:																
	% of Tickets Within SLA (Resolution)																
		2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
1	TECHNICIAN 🕆 🌣	Total Tickets	Total Tickets Within SLA	Total Tickets Out of SLA	Percentage Within												
2 .	Aminata Mbacke		5 5	0	100												
3 .	Anna Gibbs		1 1	0	100												
4 .	AnnaMaria Gallozzi		1 1	0	100												
5	Blake Sobol		1 1	0	100												
6	Leo Silva		8 4	4	50												
7	TR_technician service		2 1	1	50												
8																	
9																	
10																	
11																	
12																	

From there, you can manipulate the data into a more user-friendly view for presentations. You can also change the Format view of this data to Bar, for example.

