SysAid™
Manager Dashboard

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CONTENTS

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PREFACE

The SysAid **Manager Dashboard** is a module which provides a full suite of reporting features. In the **Manager Dashboard** the user can take advantage of standard reporting features or customize entirely his/her own reports.

To purchase the Manager Dashboard module, please contact:
sales@sysaid.com

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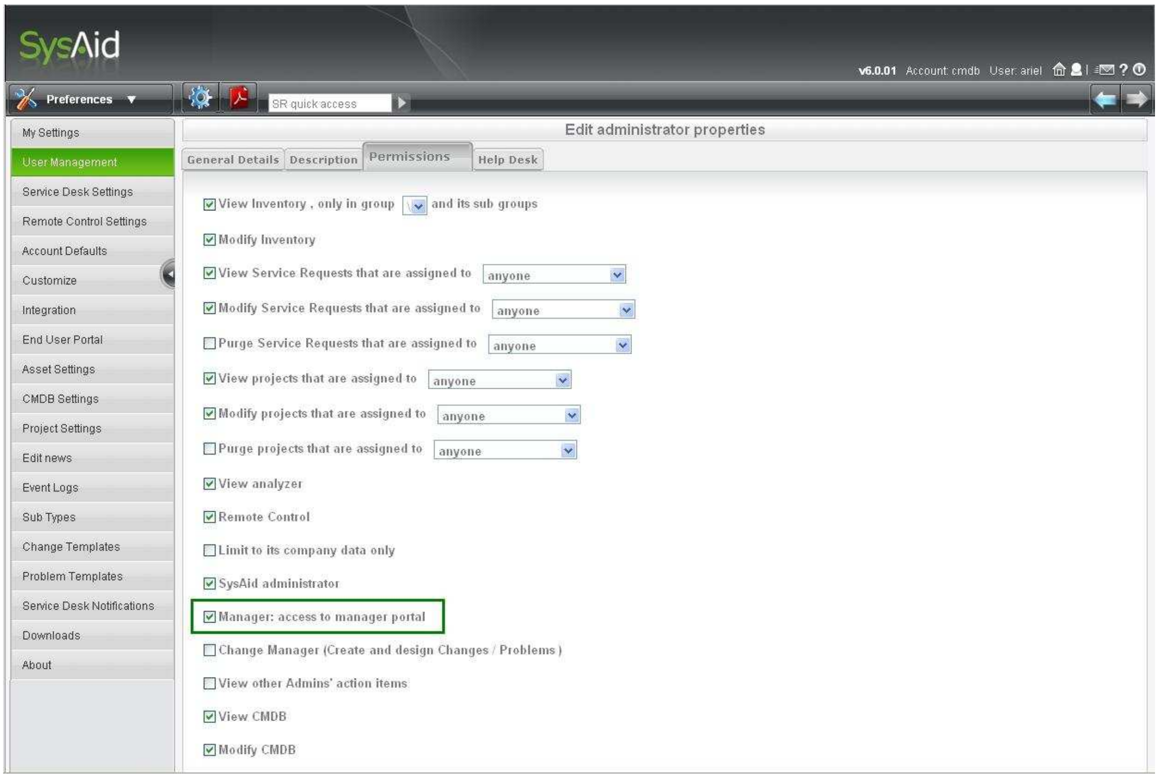
USER PERMISSIONS

Before a user can gain access to the Manager Dashboard, he/she should have had his permission authorized in **Preferences→ User Management,** in the Administrator's interface. Click on the row entry which displays the details of the user whom you wish to allow access to the Manager Dashboard. Then, go to **General Details→ Permissions.** Choose to enable access to the Manager Dashboard at the appropriate check box.

1. Manager Premission



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ENTERING THE MANAGER DASHBOARD

To enter the **Manager Dashboard** interface, login to SysAid and in the main sidebar menu click on the, **Manager Dashboard**  option (Figure 2).

2. Welcome page

From the **Manager Dashboard** Console, you can re-enter the Administrator's interface at any time. Simply click the **Administrator** link on the left sidebar menu.

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SIMPLE OVERVIEW OF THE MANAGER DASHBOARD MENU OPTIONS

Here we will describe the main menu options available.

There are five active menu links in the left sidebar menu: Dashboard, Reports, Scheduler, Design Dashboard, and Design Reports.

1. Dashboard

The **Dashboard** page (Figure 3) is the default page opened when you enter the **Manager Dashboard** console.

1. A. Dashboard Charts

The Dashboard is the place where you can review graphically summaries of your report outcomes. To set up what you see in the Dashboard go to **Design Dashboard**. You can open the full data of service requests or asset lists in the charts, by clicking any of the four charts that appear on your screen.

3. Manager Dashboard – Dashboard Interface

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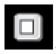
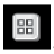
1. B. Links to Similar Reports

Some of the charts in the dashboard display similar data to the data which particular reports contain. For instance, the **Active SRs by Category** chart is a parallel of the report that is called **Active Requests**. This report can be accessed through the **Repots** link in the left sidebar menu. The **Reports** link will be elaborated on later.

If you click one of the four charts displayed on the dashboard screen, you will reach the data of the relevant list. For instance, if you click the chart 'Active Service Requests', you will reach the Active Service Requests list.

To see the chart in a larger view, click the icon on the top right corner . To go back from the larger view of a single chart to view the four dashboard charts, click again the icon on the top right corner .

2. IT Benchmarks

The second link in the menu on the left is the **IT Benchmarks**. Here you can find statistics of your helpdesk which you can share and compare with other IT experts worldwide. This information can help you better understand where you stand against world trends in these measurements.

To activate this module, click the **I Agree** checkbox, and select the type of industry you provide support services to, from the dropdown menu.

In the table, you can see a list of service desk measurements. Check or the boxes next to each measurement, if you wish to enable sharing and comparing for them.

You may click the filter icon, to filter your data according to your preferences.

The enabled measurements values will be uploaded and used for statistic purposes. In return, you will receive the perspective of your measurements compared with other SysAiders statistics enabled measurement.

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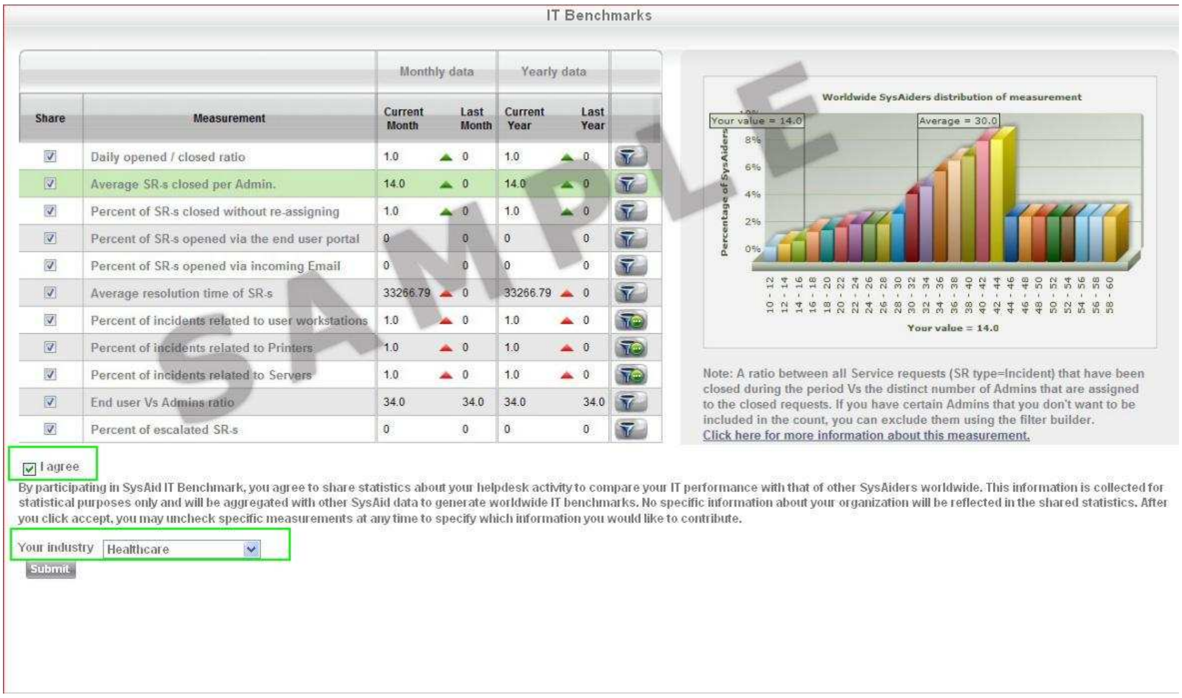
4. IT Benchmarks Permission



5. IT Benchmarks- share and compare

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3. Design Dashboard

Clicking the **Design Dashboard** link in the left sidebar menu, will bring you to the **Design Dashboard** page. Four minimized graphical presentation of report results can be selected from the **Design Dashboard**.

1. Click one of the four charts presented on your screen.
2. On the **Selected Chart Properties** box, located on the right, click on the **Select Chart** drop down menu, and select a chart to display and to design.
3. Depending upon your selection other additional input boxes, check boxes or drop down boxes will appear.

For example, if you chose to design the Active SRs chart, you will be able to change the values for the number of active service requests that appear in each level of urgency: normal, warning and critical, represented in the chart by the colors green, yellow and red (Figure 4).

6. Dashboard Design- Example-Active SRs Chart

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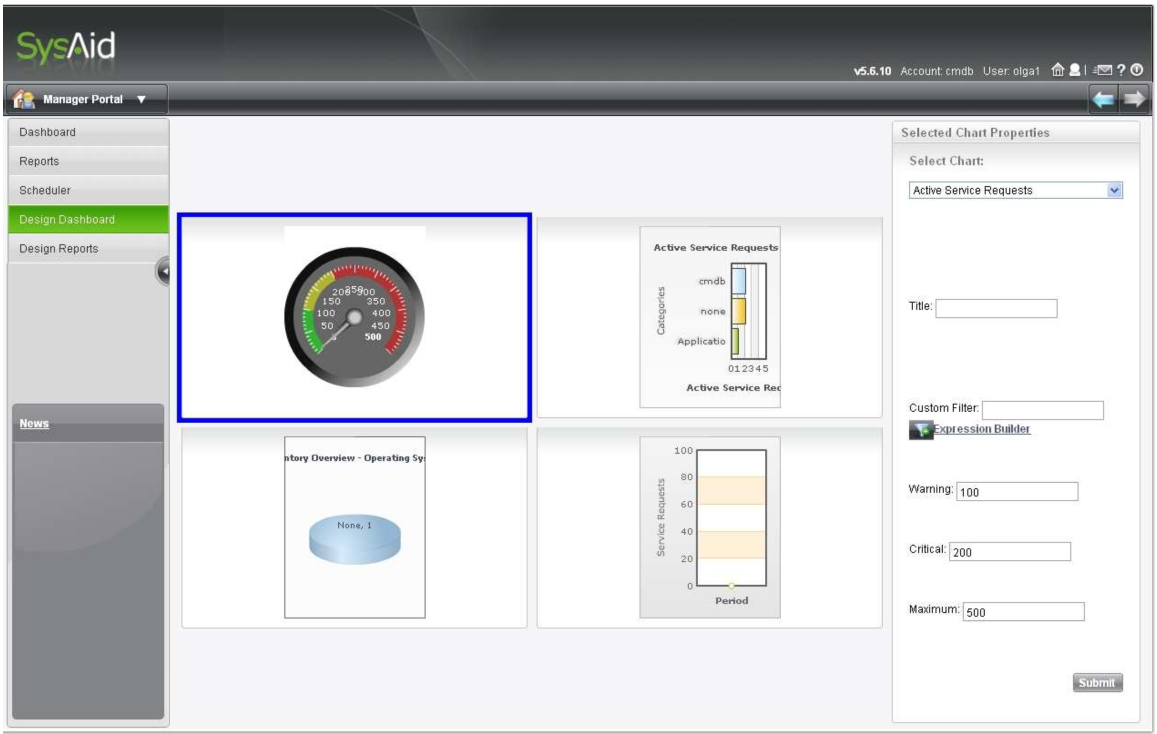
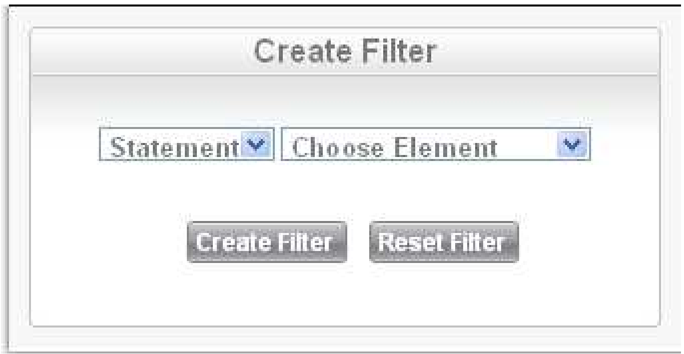


As you see in Figure 4, the default values are 100 service requests under the warning urgency level, 200 requests under the critical urgency level, and a total of 500 active requests that will appear in the chart. These values can be modified, according to your needs.

4. You can also create a customized filter to set a chart customized for your specific requirements. Click the Expression Builder on the right to create a custom filter. A new screen will open, allowing you to choose an expression for filtering the information in your chart.

7. Create filter



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5. It is possible to customize the title of your charts as well, by inserting the new name of the chart

6. Note that each manager can design an individual dashboard view that will be presented when he/she enter the **Manager Dashboard** module. To set your individual dashboard view, go to **Manager Dashboard→ Design Dashboard**, and set your dashboard view preferences. Click the **View:** link at the top of the page. In the dialogue box that opens, enter a name for your new view an click **Save.** Now you will be able to choose your view from the dropdown menu in the dialogue box, whenever you enter the SysAid Manager Dashboard. You may design several views that focus on various aspects in your IT, and easily switch between the views. You may also set the view to participate in the automatic rotating views.

7. Once you have created new views, you will be able to rotate between different views of your dashboard by clicking the **Rotate** icon.  . This will rotate between the defined views that were set to rotate. You may defined a user that automatically rotates between views upon refresh, (see my settings)

8. Finally click the **Submit** button and the four updated charts will appear on the **Dashboard** screen.

4. Reports

4. A. Horizontal Menu Bar

Clicking the **Reports** link in the left sidebar menu will lead you to the **Report** screen. On this screen you will notice the top horizontal menu bar.

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8. Reports- Horizontal menu bar

Here you can choose to view all the existing reports, the reports you have saved, or the last ten reports you ran. These can be accessed via the **All Reports**, **Recent Reports** and **My Reports** tabs.

4. B. Recent reports

The manager dashboard will save recently run reports and automatically list the last ten reports you ran. They can be accessed by clicking on the **Recent Reports** button.

4. C. My Reports

You can save particular reports that are most relevant to you, and access them by clicking on this button.

4. D. Running Standard Reports

The Manager Dashboard contains four standard folders.

- Help Desk
    - Workload
    - Service quality
- Inventory
- Highest Values Reports
- Tasks and Projects

These folders and standard reports are built into the **SysAid Manager Dashboard**, and cannot be deleted. They can, however, be made invisible for the **Reports**

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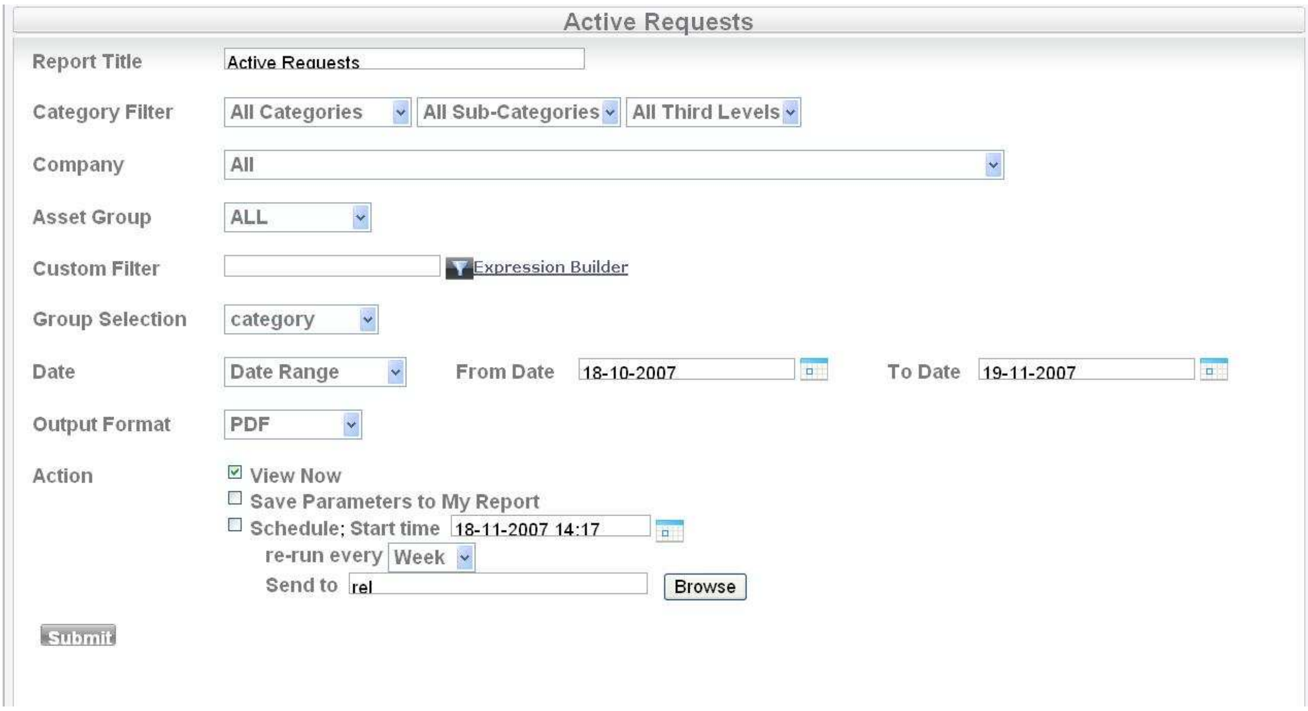
page, if you choose to disable the **Visible** box in the **Design Report** page, which is elaborated on later in this guide.

To simply run a ready report, first expand the file tree by clicking on the plus sign (+).Click on the name of a report you wish to run, for example **Active Requests**. A list of the reports titles and available parameters is tabulated in the Appendix. A new pop-up screen will open (Figure 6); in this screen all of the parameters available for running your report are presented. Make your selection.

9. Report parameters



4. E. Report Parameters

For every report there is a certain set of parameters to choose from when building your report. The **Appendix** lists the parameters available in each standard report.

Here is a description of some of the parameters that can be selected for specific reports:

4. E. i. Group

Attributing the report to a particular group helps you organize your reports and divide them into different folders.

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4. E. ii. Expression Builder

If you click the Expression Builder link, or the custom filter icon , you will be able to build an expression to filter the chosen report for specific data. Building the filter here is very similar to building a filter for a list in SysAid Administrator's interface.

10. Expression Builder

For your filter, choose between creating a simple "statement", an "and" expression, or an "or" expression. A simple statement includes an element (such as "priority"), an operator (such as "equals"), and a value (such as "urgent"). The above example would be relevant to the **Active SRs** report, for instance, and will allow only service requests with an urgent priority.

You can also create and/or expressions, connecting simple statements using Boolean logic.
If statements are connected by an "and", both must be true for the result to be returned. If an "or" connects them, one or both must be true.

4. E. iii. My Reports - Saving Your Customized Reports

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If you selected **Save Parameters to My Reports** in the Report Parameters window, this report setup will be automatically saved under **My Reports** tab, located horizontally on top of the **Reports** screen.

4. E. iv. Scheduler

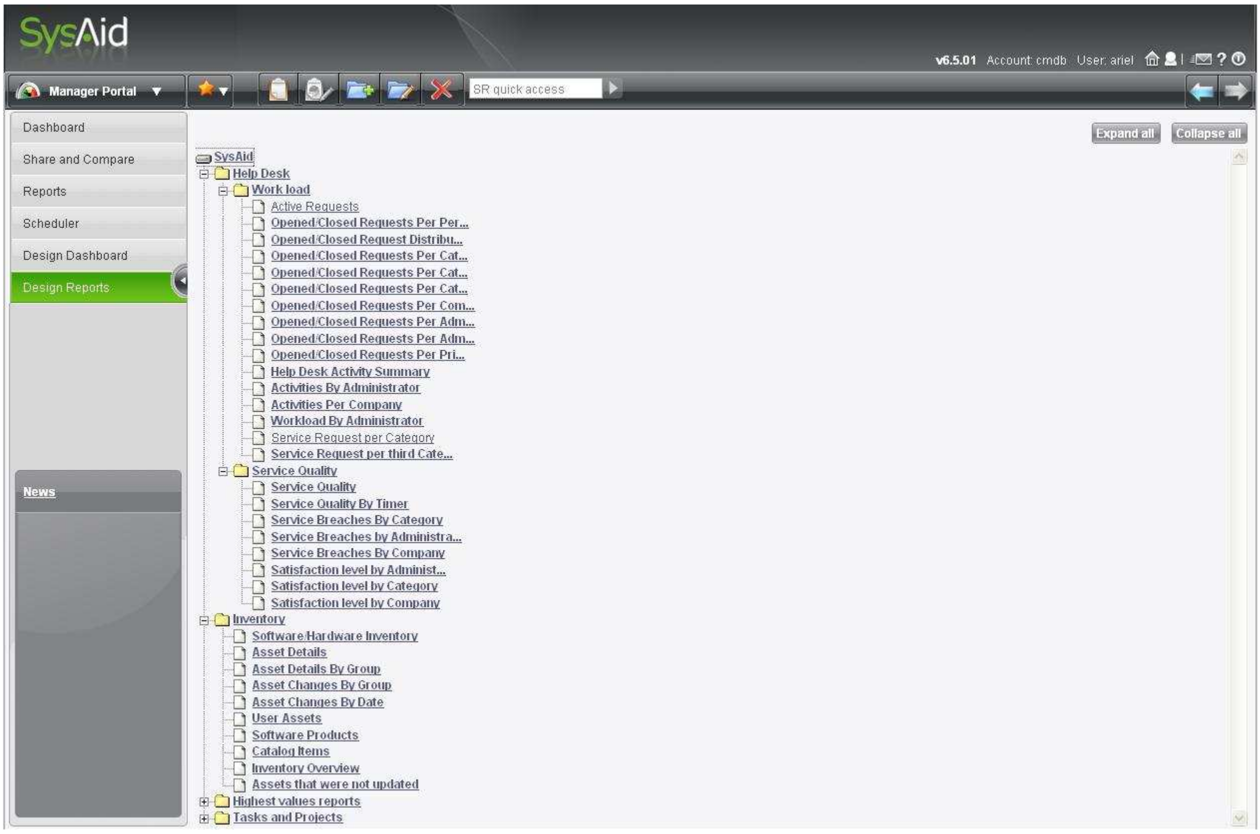
Schedule a time for the report to run. Check the box **Schedule** and choose a Start time. Then choose the frequency of the scheduler in the drop down menu (either every Day, every Week or Month).

Here you can also choose the users that will receive the report. Each time SysAid will re-run the report, it will be sent automatically to the users you have chosen. In case there is no data to report, a message will be sent to the chosen user/s nevertheless, stating the fact that there is no data to report. Browse for the name of the user/users you wish to send the report to from the list of users in the Administrator's interface.

5. Design Reports

From the **Design Reports**  interface you can modify the file tree, add more reports, change names and delete reports (Figure 9).

11. Design Reports interface



5. A. To modify a report

1. Click the report you wish to modify.
2. Click the **Modify Report** icon 
3. A pop up screen called **Modify Report** will open (Figure 9). Here you can modify the four elements of a report: its properties; design; prompt and script.

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5. A. i. Modify Report: Report Properties Tab

Under the **Report Properties** tab in the **Modify Report** pop up screen, you can re-name a report, and render a report invisible.

1. Change the report name – in the caption box you can change the name of the report. Enable the **Visible** box to show it in the reports file tree.

2. To render a report invisible in the **Reports** page, choose the report you want to render invisible, and then click the **Modify Report** button in the Action box on the right. The **Modify Report** pop up box will open. Under the **Report Properties** tab, disable the **Visible** check box. This will render the report invisible.

12. Modify Report pop up screen

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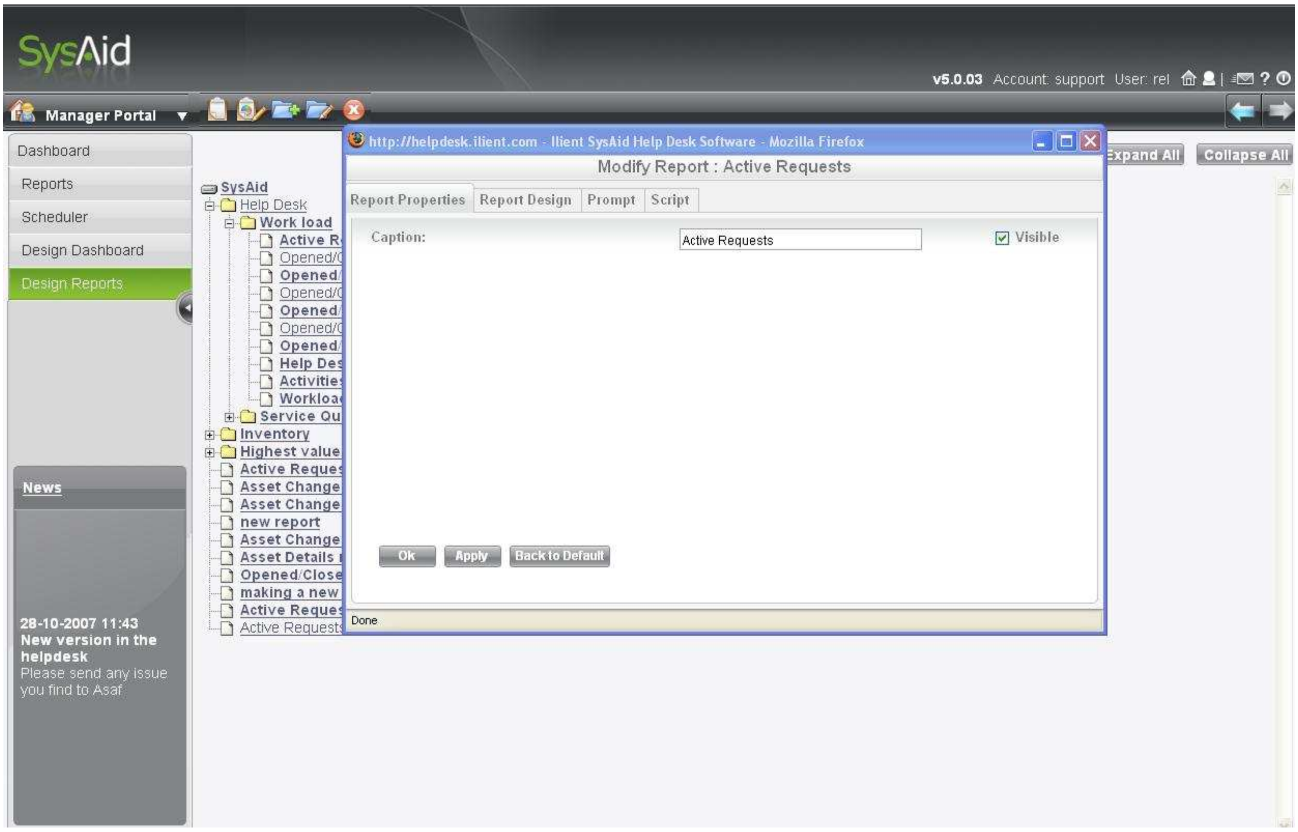

Note: Some of the features in the following section may require computer programming abilities. Therefore, we recommend that only users with sufficient programming skills will engage in modifying the reports as described below.

5. A. ii. Modify Report: Prompt Tab

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Under this tab you can find a box called **Edit Prompt Text** (Figure 11), which contains the code that designs the parameters in the Report Parameters pop up screen (Figure 6).

Here you can edit the Report Parameter window, add or delete parameters and categories, or change the design and the title of the window itself.

The prompt text is written in HTML and velocity code. The different parameters are presented by tags. A **Manager Dashboard** user can edit this code, if he/she is familiar with it, of course. Finally, changes in the prompt code can be saved by clicking **Ok**.

To learn more about Velocity code, you may consult the following web page:

- http://jakarta.apache.org/velocity/

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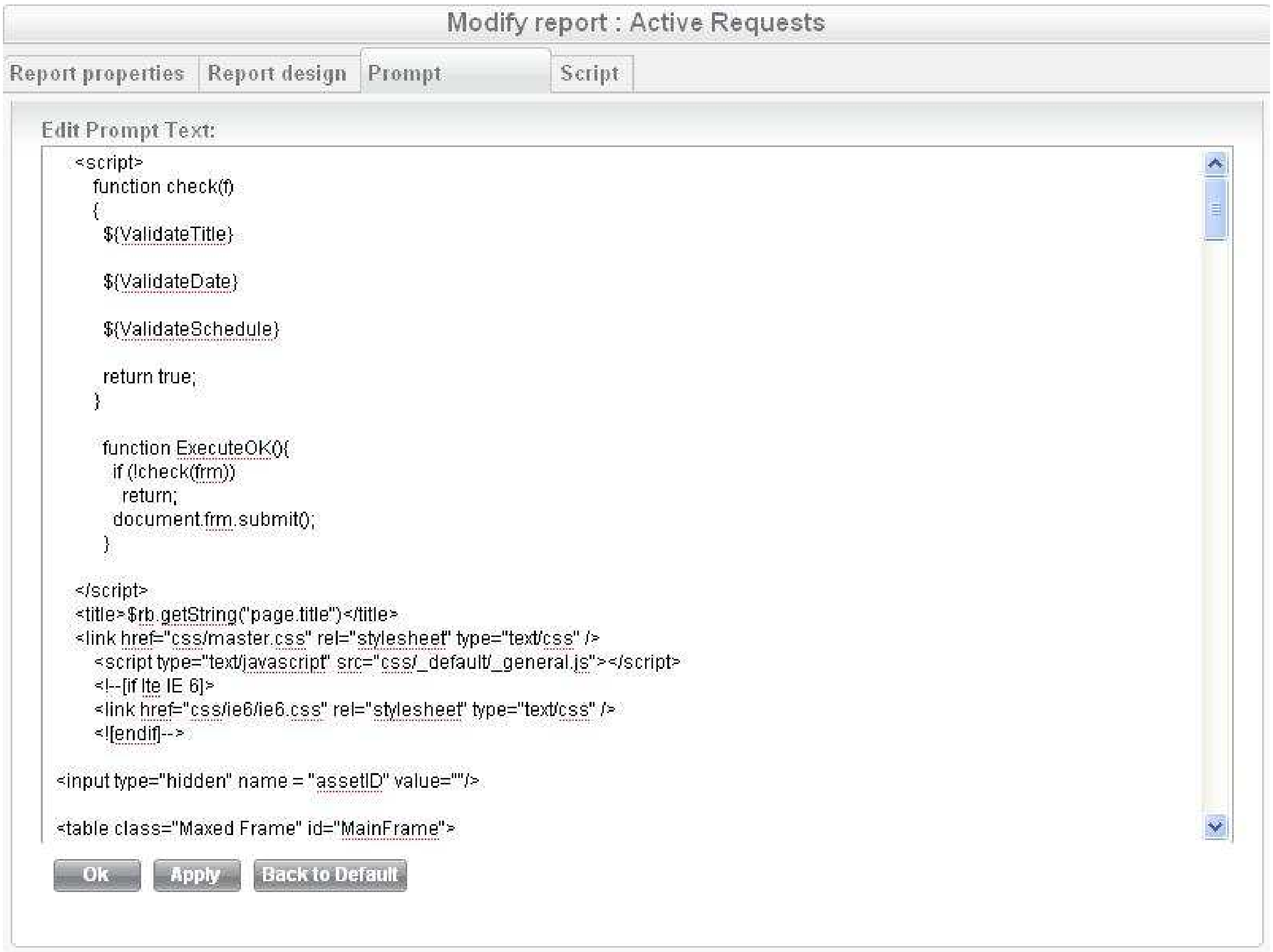
13. Prompt screen



5. A. iii. Modify Report: Report Design Tab

Click the **Report Design** tab (Figure 12). Here you can change and customize the report output. Header, footers, report title and sub-titles can be edited here, by using the program iReport 1.2.3. You can download it here:

http://jasperforge.org/projects/ireport

http://jasperforge.org/website/ireportwebsite/IR%20Website/iReport_documentation.html?group_id=243&header=project&leftnav=yes&target=ireport

Alternatively, you can edit the report manually with a text editor, or with Notepad.

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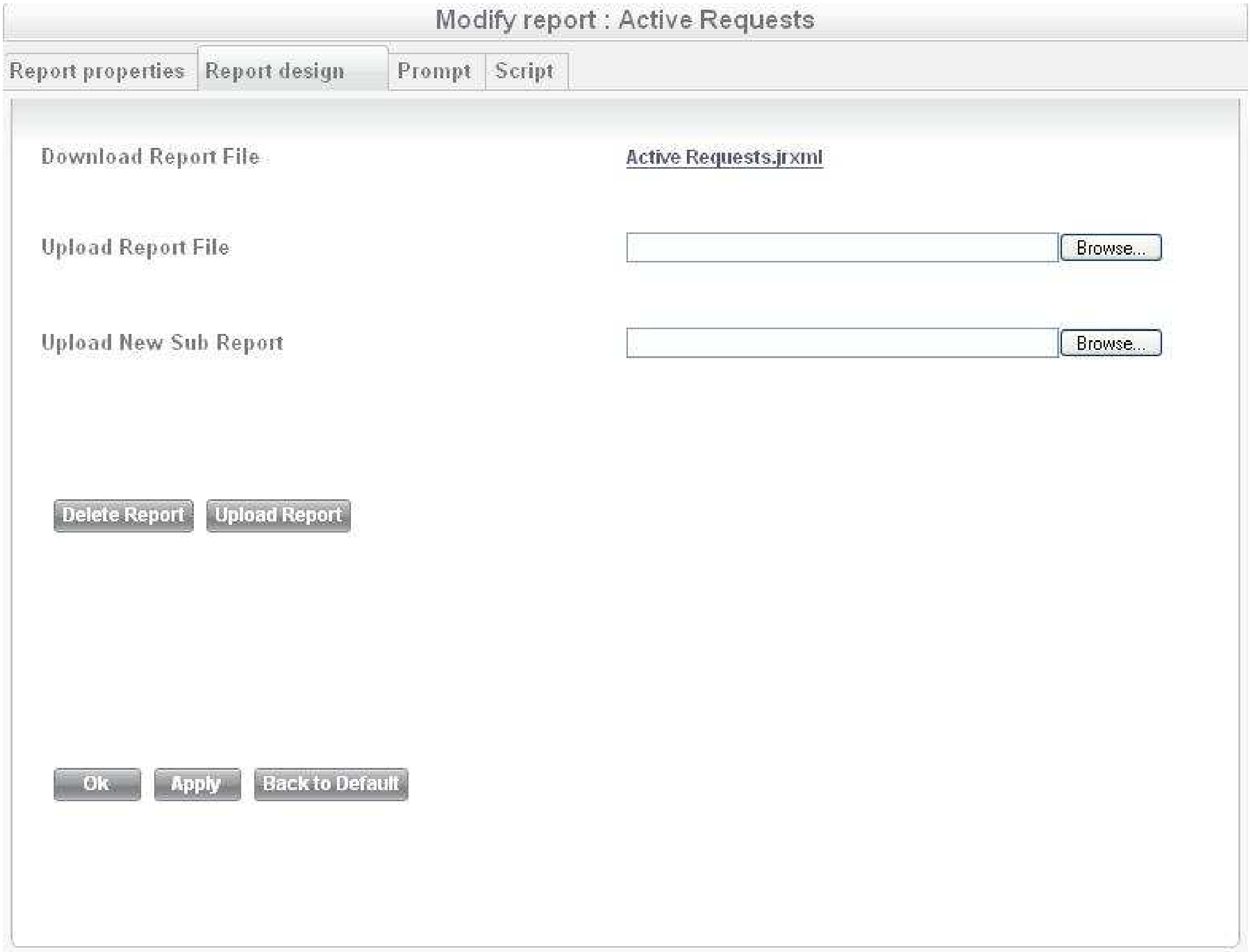
14. Report Design screen



Customize a report layout based on a standard report- upload newly amended file

1. In **Design Reports** > click on the report name in the file tree.
2. Then click on the **Modify Report** button, positioned to the right of the screen, in the **Action** box.
3. Click on the **Report Design** tab. The Report Design screen will open.

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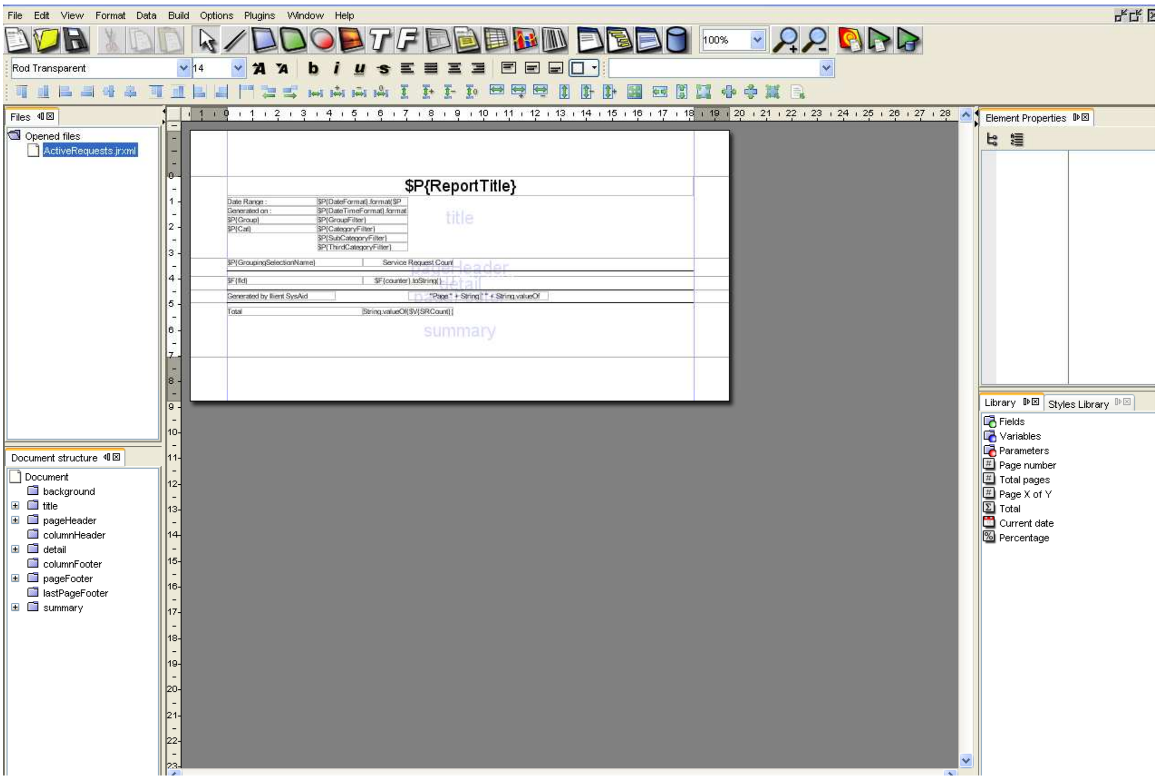
4. First download the report file or sub report file you wish to edit. Click on the file name. Choose to open the file and make your changes in iReport 1.2.3. (Figure 13) Then save them or save the report locally.

15. iReport 1.2.3.



5. Upload the file, click browse button next to the **Upload Report** File. Then click the **Upload Report** button at the bottom to complete.

6. Finally click Ok. The window will automatically close. Your new changes have been overwritten into the report file (.jrxml). Next time you run the report these changes will determine the report layout.

7. You can always choose to go back to the default design. Simply click the Back to Default button on the bottom of the Modify Report screen.

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5. A. iv. Sub Reports

Under the report design tab, using the iReport 1.2.3, a report can sometimes be split and contain a sub-report part.
A sub report can contain extra design output or create more complex reports.
For instance, you may want to divide a report, such as **Open/Closed requests by Company** to Local companies and regional companies. For this purpose, the sub report option can be useful.

Tutorials of how to use iReport for sub reports can be found in the following address:

- http://jasperforge.org/uploads/publish/ireportwebsite/IR%20Website/swf/Subreport.swf
- http://jasperforge.org/espdocs/docsbrowse.php?id=12&type=docs&group_id=83&fid=40

When this option is available you will see in the **Report Design** tab a **Sub Report1** option. Repeat steps 4, 5 and 6 above to edit the sub report.

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5. A. v. Modify Report: Script Tab

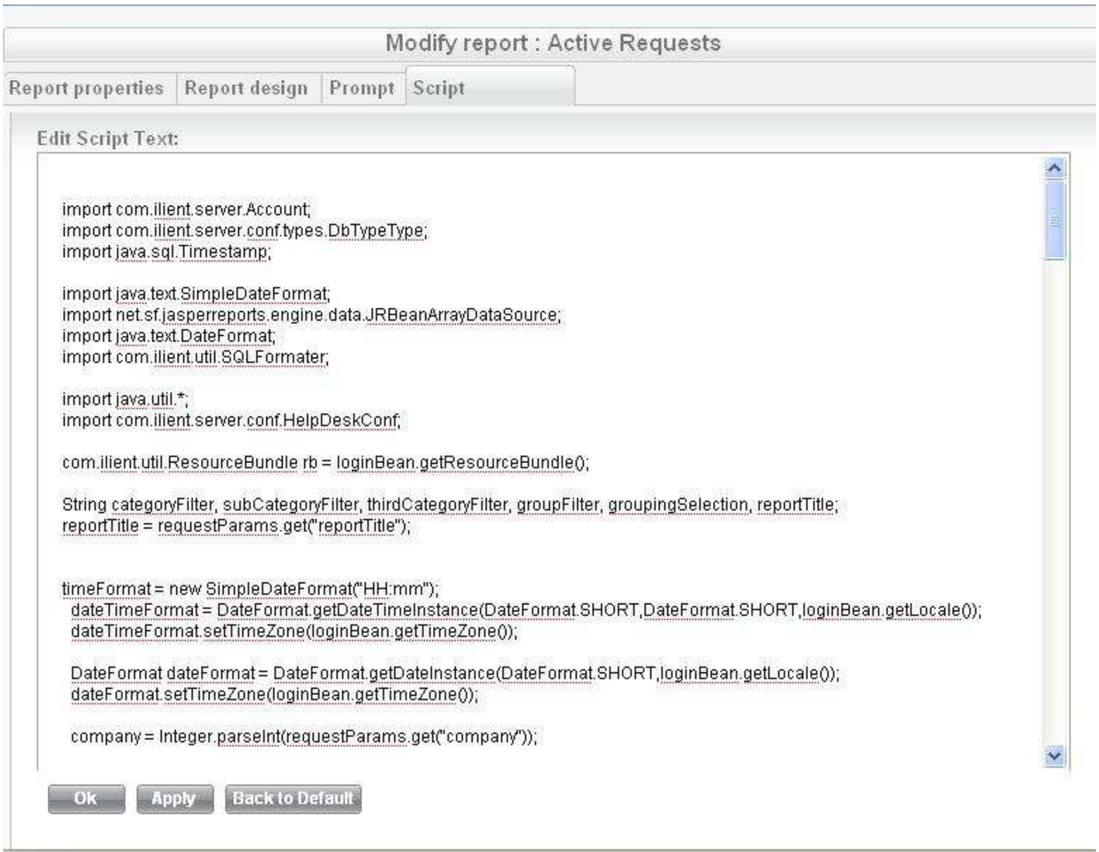
Under this tab you can find a Groovy code that runs between **Prompt** and **Report Design** (Figure 13). A **Manager Dashboard** user can edit the script code him/herself, if they are familiar with Groovy code.

The data in the more complex reports needs to be processed prior to the designing of the report under the Report Design tab. The script enables to process this data.

For further information about Groovy code, you may consult the following web page:

- http://groovy.codehaus.org

16. Script screen



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5. B. Create a New Report

Click on **Design Report** in the sidebar menu.

1. First click on the folder name where you want to create the new report. Note that new reports cannot be added to the default folders in SysAid.

2. To create a new folder, click the main SysAid folder to enable the icon, and then click **New Folder** icon . To delete a folder, choose the folder you wish to delete and click the delete button . If you have created a new folder, you will be able to add a new report to it. Otherwise, click the main SysAid library to add a new report or a new folder. Note that you can only edit or delete reports and folders that you have created, and not the folders and reports that come as a default with SysAid.

3. Click on the **New Report** icon , located in the top horizontal menu. The **New Reports** option screen will open (Figure 14). Select a template type. Click **Save.** Then the **Modify Report** screen will appear and you should name or rename this report, then click **Ok**.

4. You can also choose to create a new report which is not based on a previous template by choosing the Empty Report check box.

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17. New Report screen

Preparing a new report based on an existing template can be very useful for many purposes. For example, you can add the logo of your company to a standard report in this fashion. However, we recommend that only users with the required programming skills will design new reports.

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5. C. Modify Folder/Group

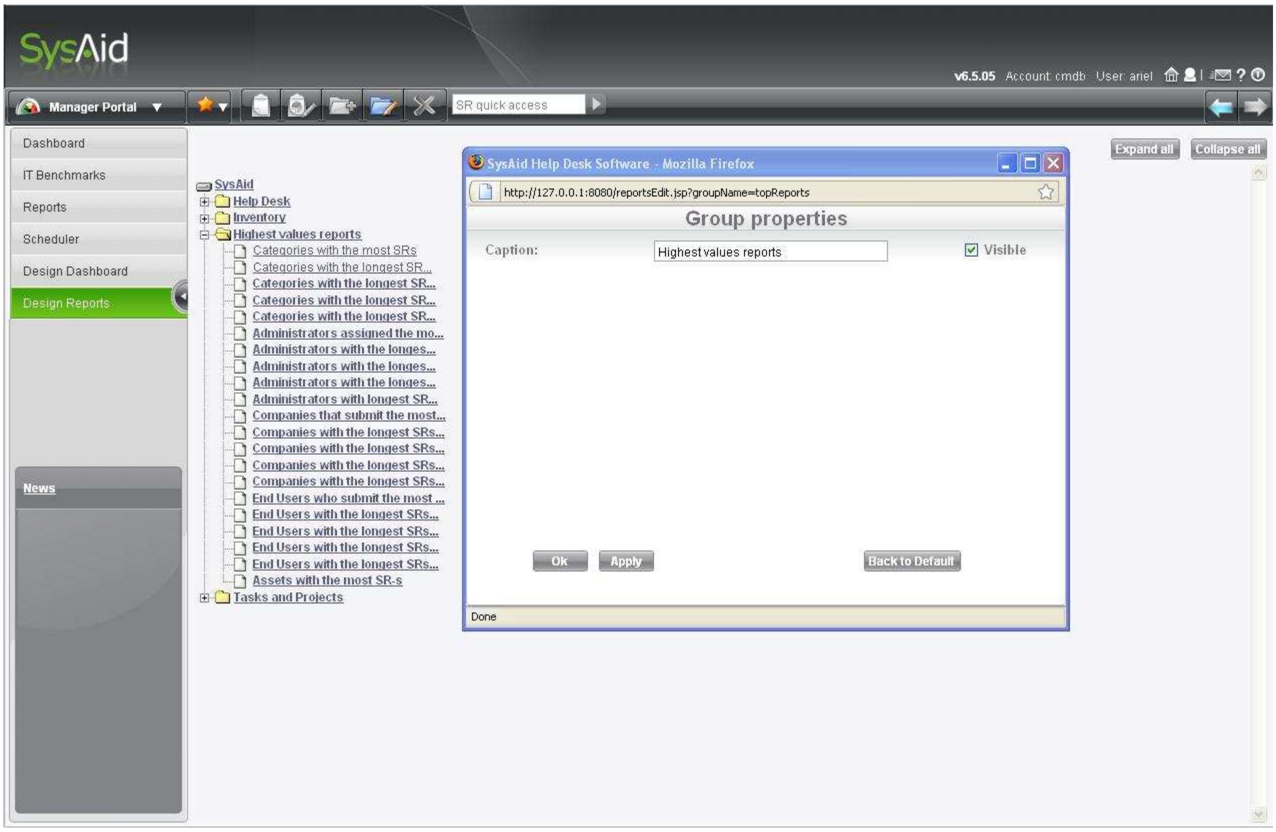
1. Click on the folder name.

2. Then click **Modify Folder** button in the top horizontal menu bar . A pop box will open called **Modify** Group (Figure 16).

3. Type the new name in the caption box, and click **Ok**.

4. You can also render a folder invisible, by disabling the **Visible** check box.

18. Modify Folder screen



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5. D. Create New Folders

To create a new folder, click on **Design Reports** in the sidebar menu. Click on the **New** icon . In the caption box, type the name of your new folder. A new folder will be inserted in to the file tree.

5. E. Delete

The **Manager Dashboard** includes standard reports, that is, reports that already exist in the module to begin with, and therefore cannot be deleted. These you can render invisible, by disabling the visibility option in the **Modify Report** screen.

Only reports that you have added yourself can be deleted. Simply choose the report you wish to delete, and click the **Delete** icon .

6. Scheduler

You can review when reports are set to run using the **Scheduler** (Figure 17). Details of when the report is set to run are provided. Click on **Scheduler** from the sidebar menu.

To change the data of when the report should run, click on the report title or on the Edit icon. The parameters set for that report will open. You also have the option to delete the schedule report run by enabling the **Action** box, then clicking on the **Delete** icon.

The user specified in the Scheduler table will receive the report via email on each re-run. In case the report does not contain any data, the user will receive an email message stating that there is no available data.

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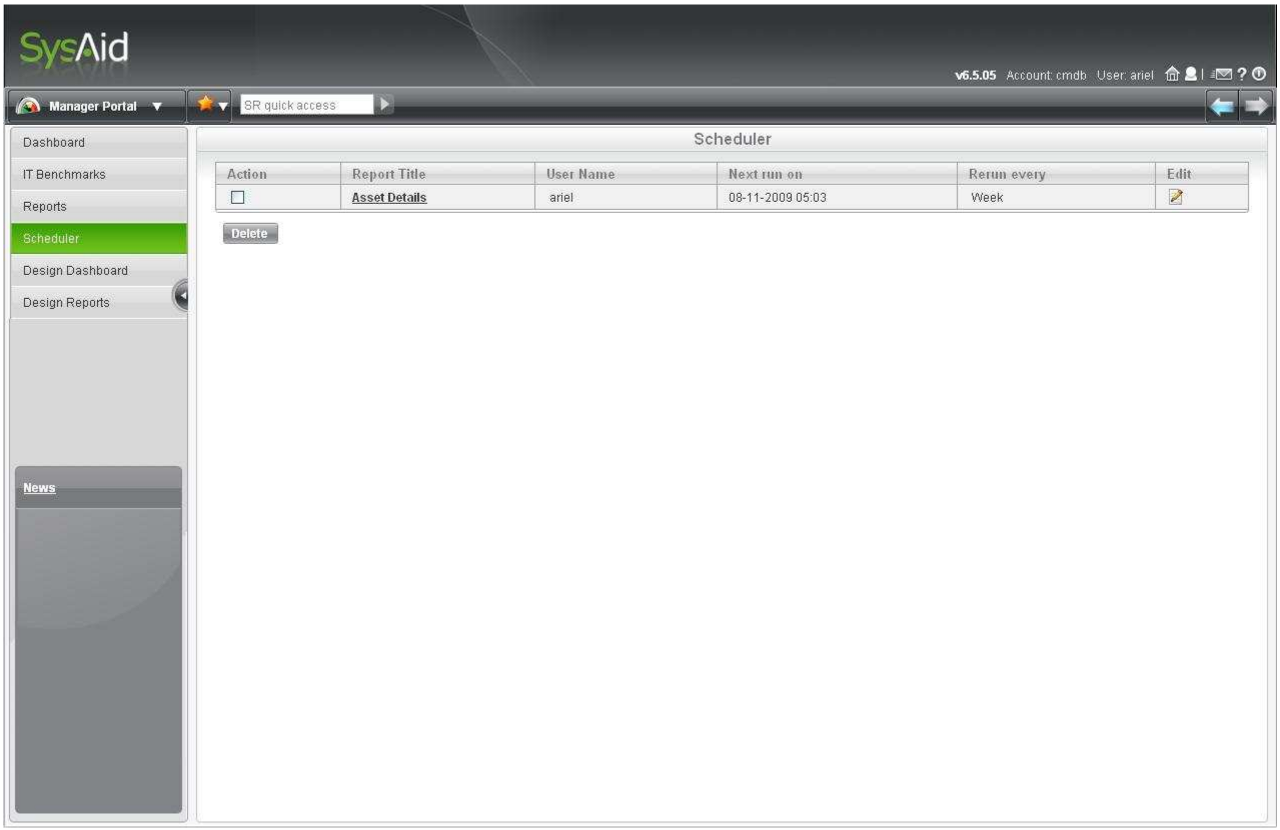
19. Scheduler



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APPENDIX

1. Help Desk/Workload Folder

Parameters

	Category Filter	Company Filter	Asset group Filter	Expression builder	Main grouping	Sub-grouping	User	Date
Active requests	X	X	X	X				
Open/Closed requests per period	X	X	X	X				
Open/Closed requests per category	X	X	X	X				
Open/Closed requests per company	X	X	X	X				
Open/Closed requests per admin	X	X	X	X				
Open/Closed requests per admin group	X	X	X	X				
Open/Closed requests per priority/urgency	X	X	X	X				
Help Desk activity summary		X			X	X		
Activities by administrator		X					X	X
Workload by administrator		X						X
Service Requests per third category	X	X	X	X				X

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2. Help Desk/Service Quality Folder

Parameters

	Category Filter	Company Filter	Expression builder	Main Grouping	Timer
Service Quality	X	X	X	X	
Service Quality by timer	X	X	X	X	
Service Breaches by category	X	X	X		X
Service Breaches by administrator		X	X		X
Service Breaches by company		X	X		X
Satisfaction Level By Administrator					
Satisfaction Level by Company					
Satisfaction Level by Category					

3. Inventory Folder

Parameters

	Item type	Company filter	Expression builder	Group filter	Choose a single asset	Date	User	Show asset details
Software hardware inventory	X	X	X					X
Asset Details		X	X	X	X			
Asset changes by group		X		X		X		
Asset changes by date		X		X		X		
User Assets							X	
Software Products		X						
Catalog Items								X
Inventory Overview		X		X				

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4. Highest Values Reports Folder

Parameters

	Category Filter	Company Filter	Timer	Expression builder	Number of Records	Date
Categories that contain the most SRs	X	X		X	X	X
Categories with the longest SRs time (average)	X	X	X	X	X	X
Categories with the longest SRs time (total)	X	X	X	X	X	X
Categories with the longest SRs activity time (total)	X	X		X	X	X
Categories with the longest SRs activity time (average)	X	X		X	X	X
Administrators with the most SRs assigned to	X	X		X	X	X
Administrators with the longest SRs time (average)	X	X	X	X	X	X
Administrators with the longest SRs time (total)	X	X	X	X	X	X
Administrators with the longest SRs activity time (total)	X	X		X	X	X
Administrators with longest SRs activity time (average)	X	X		X	X	X
Companies that submit the most SRs	X	X		X	X	X
Companies with the longest SRs time (average)	X	X	X	X	X	X
Companies with the longest SRs time (total)	X	X	X	X	X	X
Companies with the longest SRs activity time (total)	X	X		X	X	X
Companies with the longest SRs	X	X		X	X	X

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	Category Filter	Company Filter	Timer	Expression builder	Number of Records	Date
activity time (average)						
End Users who submit the most SRs	X	X		X	X	X
End Users with the longest SRs time (average)	X	X	X	X	X	X
End Users with the longest SRs time (total)	X	X	X	X	X	X
End Users with the longest SRs activity time (total)	X	X		X	X	X
End Users with the longest SRs activity time (average)	X	X		X	X	X
Assets that were not updated	X	X		X	X	X

5. Tasks and Projects

Parameters

	Company filter	Category Filter	Status Filter	Expression builder	Requested group	Timer	Date
Tasks/Projects Activities Overview	X	X	X	X	X	X	X
Task Activities by Administrator	X			X		X	X
Tasks per Users				X		X	X
Tasks per Statuses				X		X	X
Tasks per Project				X		X	X

Output format is standard on all reports.

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