Reports

Reports

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The reports section brings together reports from different areas: support, time management and projects. It also incorporates a custom report creator using SQL queries and a report scheduler to be able to schedule the creation and delivery of reports automatically from time to time.

Support Reports

There are five types of specific support reports, each with a specific purpose: support report, report resolution, report by ticket type and report by operator.

Support Report

It is the most exhaustive and general report. With more than thirty different filters, it allows you to create very detailed reports that allow dozens of graphs, summaries, lists and parameters to be displayed in a single PDF report. You can use it to report by customer, by customer group, by status, and so on. You can also use a custom ticket search as the report source, to further expand the search filter.

The report contains eight general pie charts with some Top-N groupings (Most Active Tickets, Most Active Customers, by Operator, Open, Closed, etc.).

General statistics and some Top-N in table format:

Listings and trend graphs:

Detailed Ticket Report

This report is specific to give all possible details of a support ticket. From the general data (the problem, title, people involved in it, custom fields, criticality, ticket age) as well as all the ticket history and its notes, activity history, SLA history and general metrics of the same .

Resolution Report

It is a technical report that shows a list of closed tickets aimed at knowing the impact it had on time, “dead breaks”, people involved and its resolution (including customer feedback).

Report by ticket type

It is a report in list format that groups the tickets by company (that creates the ticket), number of tickets by type in a given time interval. Supports different filters.

Operators Report

Specific report to control the quality of the support offered, showing metrics for each operator such as dedicated time, average ticket resolution time, positive customer feedback and total tickets (filtered by company and time frame).

Customer incident reports

This option allows you to view the number of incidents created, resolved and in progress, grouped by user, year and month.

Go to the left side menu and click on Reports → Support & Helpdesk → Customer incidents.

It consists of the following filters:

- Company: Company filter, it is mandatory.
- Users: Users, multiple choice, allows you to select the users of a selected company.

- Date: Date, allows you to search by date periods or by a time range.
- Show section state: To display the state section, it will show or not the state table.
- Show section type incidents: To display the type section, it will show or not the type table.
- Show section total: To display the globalized total of incidents.
- Created From pandora: (Created from Pandora FMS) This filter allows separating the report by incidents created from Pandora FMS or from Integria IMS (it will only be useful for clients that have a Pandora FMS associated with Integria IMS).

In the case of selecting from Created From pandora, and having a Pandora FMS associated, the first point will differentiate between the tickets created by the user, by Pandora FMS and together. That is, it will paint three graphs per user and in the total of the tickests will only sum the ones created by the user.

Table of states: Total incidents in the different states that exist in Integria IMS, for each selected user.

Table of types: Total incidents in the different types that exist in Integria IMS, for each selected user.

Table of totals: Total incidents in Integria IMS created, resolved or in progress for each selected user.

Templates

The template management can be accessed through the Reports menu → Report Manager –> Templates. A view will be displayed with the list of templates already created where we can edit these, delete or create new templates.

To create templates, we will select the Create button that will take us to the form:

In First page we have an editor to compose the cover of our reports. You can add images, links, format the text and you can use the macros:

- `_fullname_` to replace your name.
- `_reportname_` to replace with the name of the report.
- `_date_` to set the date.
- `_time_` to replace it with the time.

This also applies to the Header. In addition, the Header logo can be customized.

Project reports

Shows the requested information of the projects, access from the menu Reports → Project Management → All projects:

You can filter by:

- Text string that will match the name and description of the project (text field in String to match in title or description of project).
- Owner of the project (text field in Owner project).
- Person(s) involved (text field in People involved).
- Date (text field in Date and placing start in From and end of period in To).
- Project group (list in Project group).
- Included archived project: Archived projects, not by default (activated in the example image).

With the filters set, press the Report button and a list will be displayed with the following information:

- Id: Project identifier number.
- Group: Project group.
- Name: Name of the project.
- Owner: Owner of the project (Manager).
- People involved: People involved in the project.
- Progress Task: Total tasks completed and progress percentage.

This list is available in HTML format, full screen and in PDF (it can also be exported in CSV format) through the icons located at the top right of the filter box.

GitLab Reports

By enabling and configuring the connection with a GitLab instance, and having executed or scheduled the query with that instance daily, you will be able to obtain reports

It has a filter that allows you to choose:

- People).
- Date range.

Once created, it shows a table with the following information:

- Person.
- Total time spent by that person.
- ID# of tickets with time spent, separated by commas and link to the URL of the configured Gitlab instance.

Custom Reports (SQL)

There is a way to create fully customized reports, which return a table that can be exported to excel or PDF, are SQL custom reports. Only a global administrator can create them and they need to know SQL and the internal structure of the database to be able to create them:

Once created, other users with access to the reports (and the group) will be able to view and/or export them:

Report Manager

With the report manager you can create templates and report generation schedules to be sent by email or stored in the system's report library so that they can be consulted later.

Report Templates

They consist of defining a custom cover, which uses some macros to show the date and time of generation and the type of report it is. Those report templates can then be used to generate a more professional looking PDF report.

Available macros:

- `_fullname_` will replace the name of the report creator.
- `_date_` will show the date the report was generated.
- `_time_` will show the time the i was generatednreport.
- `_reportname_` name and type of the report.

This template:

It will look like this in a PDF

Report Scheduling

A report can be scheduled to run every month, week or day, and be stored in the system library or emailed to someone (or both). To do this, simply create an entry in the report scheduler:

Depending on the type of report chosen, you will have additional filters, for each type of report they will be different. For example, in the support report these filters will appear:

You can create as many schedules as you need.

Dashboards

The dashboards or control panels allow you to have at a glance the information considered most important when logging into Integria IMS. For this, they can be customized for each user, creating different dashboards for each of them. See the section "Users and groups" for more information.

To manage dashboards go to the left side menu and click ►Reports → Dashboards → Manage Dashboard.

You can filter by keyword in the text box and ♦Search button, to create a new dashboard press the ♦Create button.

Each listed dashboard has two icons in the ·Actions column for editing and deleting the corresponding dashboard.

Creation

To create a dashboard write a name (Name) and select a group (Group) from the list and finally press the ♦Create button.

The dashboard is enabled by default (Enable). The dashboard data editing process is similar to the creation process.

Edit

Once the dashboard is created you can edit and add widgets, click on the name of the dashboard to edit in the home list. A message will appear indicating that the dashboard is empty (Dashboard empty).

To start editing, click on the slider button, last on the right:

A plus sign icon will appear with which you can add a widget. The message that indicates that the dashboard is empty can be closed using the X button to the right of it.

In each added widget (New widget) you can assign the desired type of widget through the Add widget button.

Widgets

This list of widgets will be increased at the time, for now the available widgets are the following:

Welcome

It is a widget without any configuration and it appears by default in Integria IMS. Contains an informative message about the use of widgets in Integria IMS. Feel free to practice adding, modifying (dragging its borders with the mouse), and removing until you are familiar with the process.

Custom Issues

By adding a custom incidents widget (Custom incidents) you will be able to configure its characteristics for the presentation.

By default, common fields and options appear in all widgets:

- Title: Title of the same.
- Background Title and Color Title to select the font color and background color of the title.
- Background: Background color of the body of the form.
- The widget refresh period (Period), by default 30 seconds.

For custom issues:

This widget is based on using the different personalized searches of the tickets, allowing to display with the pagination and the fields in a personalized way with the filters:

- Custom search: This field is required, select custom search.
- Pagination: Number of rows to display.
- Fields to show (Fields to show): Fields to show. It is mandatory to select at least one of them; these fields will be sortable. The ID and Title fields will have a quick link to go to the selected issue.

To save press the Ok button. You will see something similar to this:

Example of a dashboard (they can also be shown in full screen):

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