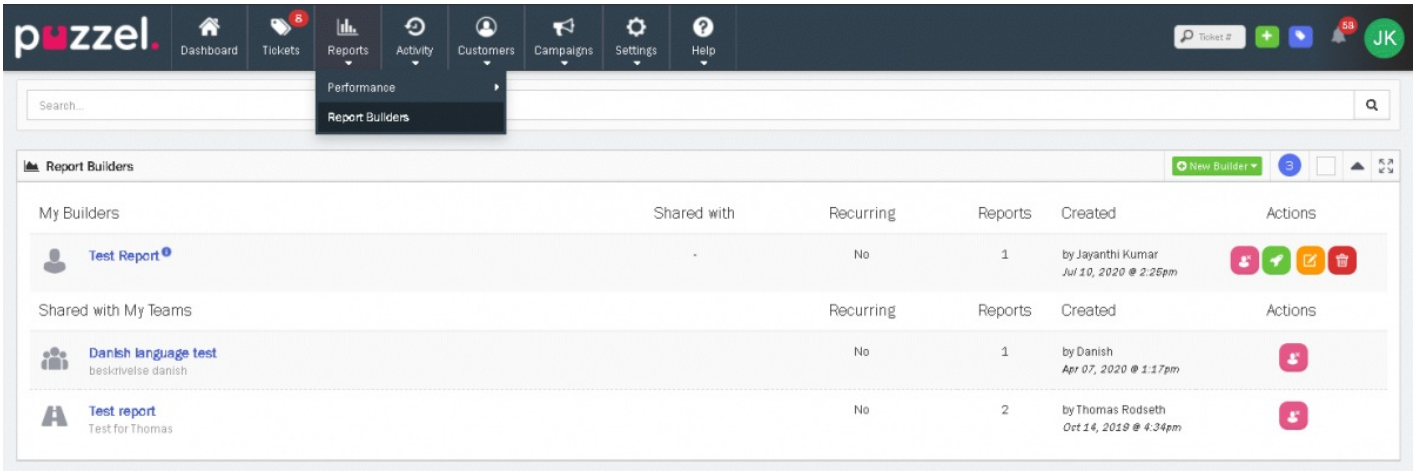
Report Builder

The Report Builder in Puzzel Ticketing is designed to allow you to create and generate your own custom reports as standard. You can even set these reports to generate automatically at a frequency of your choice and email the results directly to you.

Report Builders can be found under the Reports tab in action bar for Users with access to Reports:

Reports > Report Builders

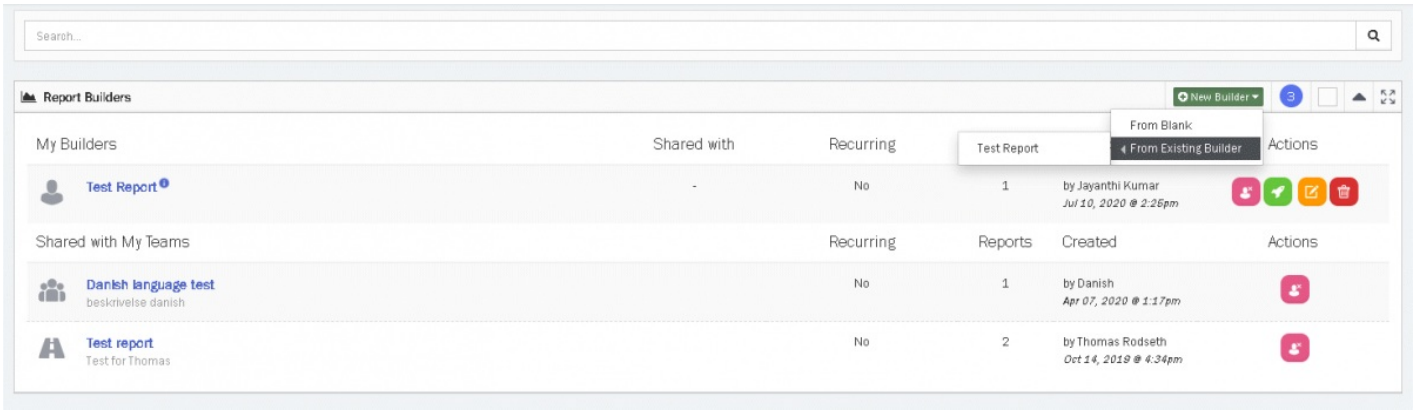
Your list of available Report Builders will be shown. This is divided into Report Builders you own, and Report Builders owned by another User that has been shared with you.



Create a new Report Builder

Creating a Report Builder is broken down into 6 quick and easy steps.

To create a new Report Builder, click on the New Builder button



If you already have at least one Report Builder, you will have the option to create a new Report Builde**From Existing Builder**, otherwise you can create the report builder from scratch.

> Note
>
> Creating a new Report Builder from an existing Report Builder will open the Report Builder creator pre-loaded with the options for the existing Report Builder. You can make adjustments to these options before saving this new Report Builder.

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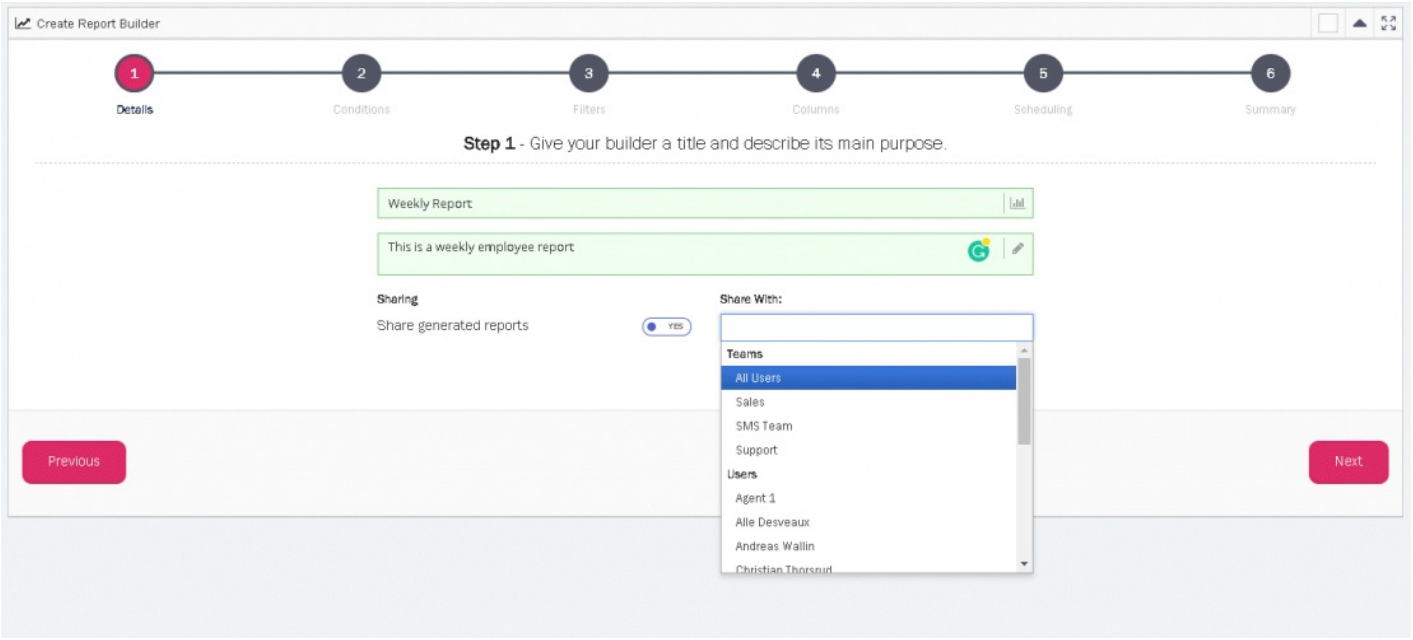
Step 1

Specify Name and Description of your Report Builder

The name of the Report Builder must be unique and descriptive enough for you to know what type of Reports the Report Builder will generate. Use the description field to provide further information for the Report Builder (optional). You also have an option for sharing it with everyone or with a certain group. If you wish to keep it private share the Share generated reports to **NO.** Click **Next** to go to the next step.

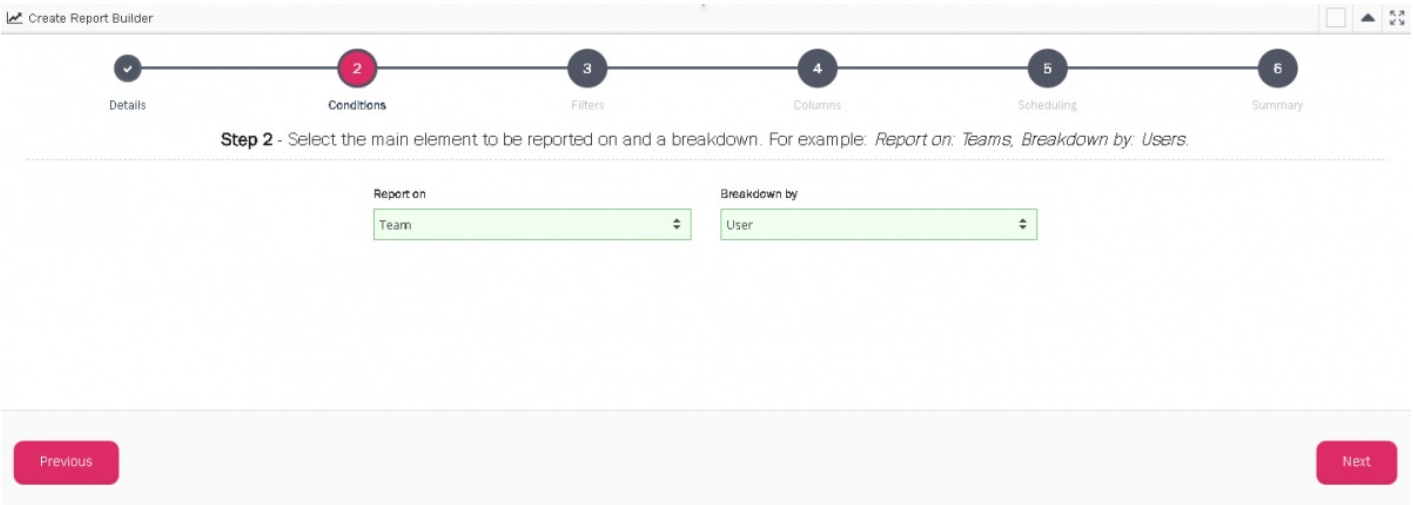


Step 2

Select the conditions for your Report Builder

In this step you can select what data you want to report on. Simply select the Ticket Attribute type from the **Report On** drop-down menu.You can choose to further break down this selection by selecting a different Ticket Attribute type from the **Breakdown by** drop-down menu.

E.g. If you select to report on Teams and Breakdown by Users, your report will Report on the individual Teams in your Puzzel Ticketing account as well as the User's performance within these Teams. Click **Next** to proceed.



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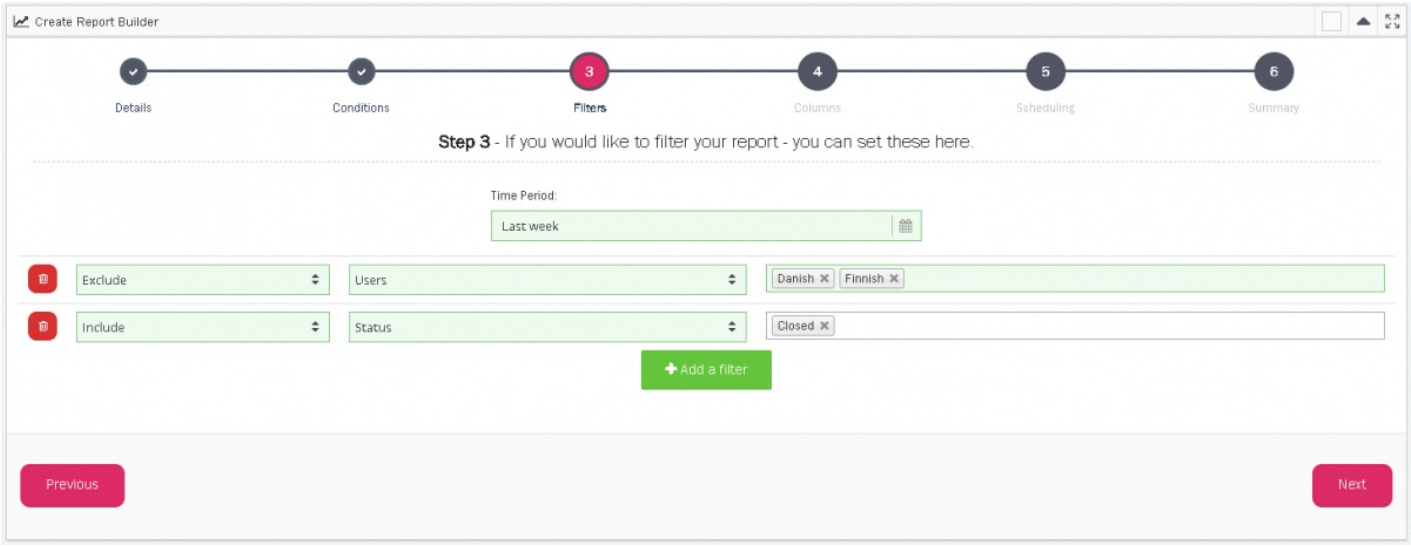
Step 3

Select the Time Period for your Report

You can select a specific time range of your choice, or choose from a pre-defined Time Period, such as **This Week** or **Last Month** etc. – These pre-defined Time Periods are relative to when a new report will be generated, even if you set your Report Builder to automatically recur.

E.g. If you set your Report Builder to recur every month and selected the Time Period **Last Month**, the data from the previous month at the date of generation will be used each month.



You can also set custom filters to Include or Exclude specific Ticket information from your Reports. Simply click the **Add Filter** button. Choose to Include or Exclude from the first drop-down menu. The type of attribute or information you want to Include or Exclude in the second drop-down menu. You select the specific attributes to Include and Exclude in the third drop-down menu.

> **Note**
>
> You can only have one filter for each attribute type. E.g. You can either Include or Exclude Teams, i.e You cannot set one filter to Include one Team and another Filter to Exclude another as this would be contradictory.

Step 4

Include the Columns of your choice for your Report Builder

The Columns on the left are the available Columns that can be added to your Report. The Columns on the right have already been added to your Report and can be removed by clicking on it.

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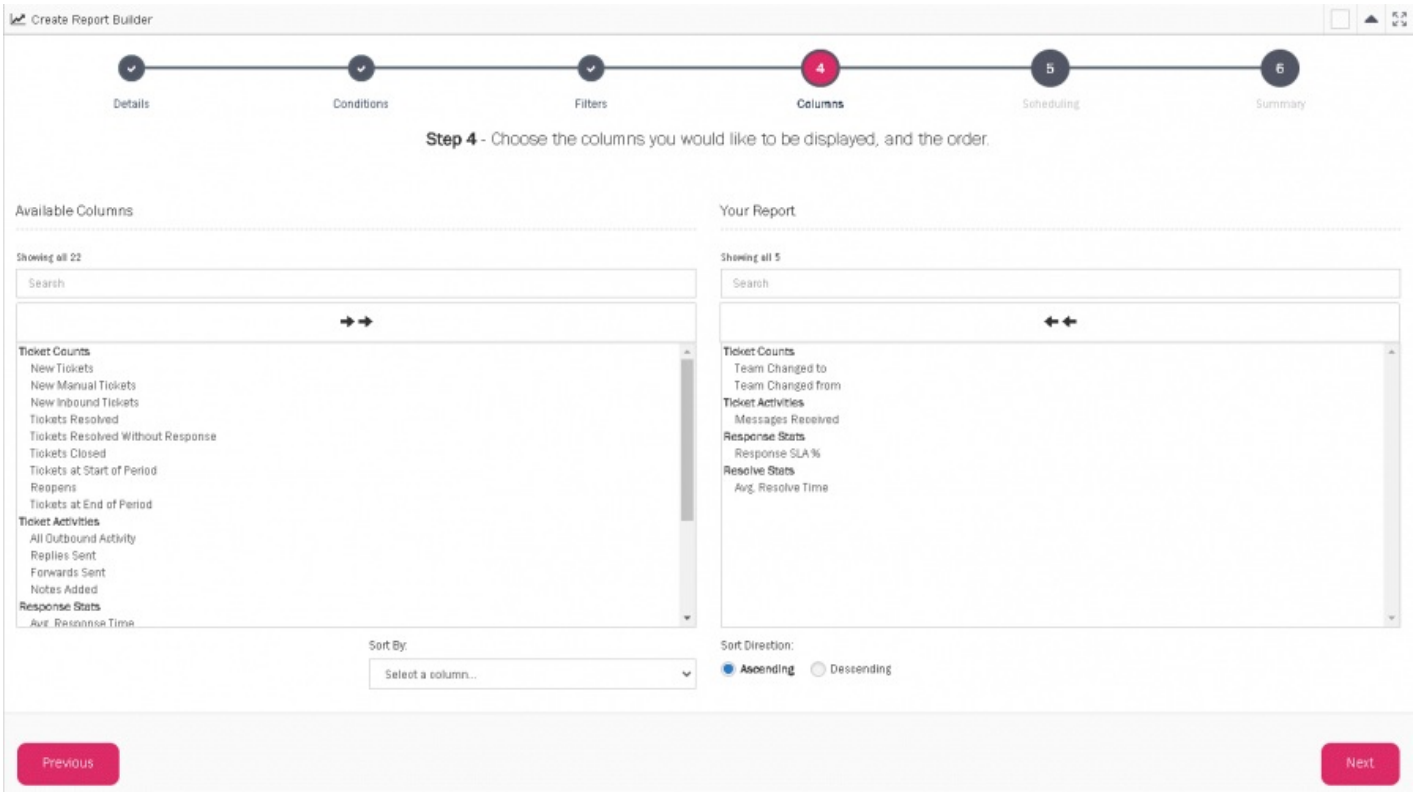

These Columns are broken down into four categories:

- Tickets Counts
- Ticket Activities
- Response Stats
- Resolve Stats

Most of these Column names are self-explanatory, but more information about each Column is available **here.**

You can include and remove all columns by selecting the two arrow buttons. Alternatively, you can select a specific Column to add or remove by simply clicking on it. You can click and drag to select a range of Columns to add or remove. Click **Next** to proceed.

Step 5

Result Format

You can select to make your Report available in additional downloadable formats:

- CSV
- XLSX
- PDF – Only available for Report Builders with 10 Columns or fewer.

If you want to download your generated Reports for this Builder in PDF format, but have already selected more than 10 Columns, you can go back to the previous step and update your selected Columns.

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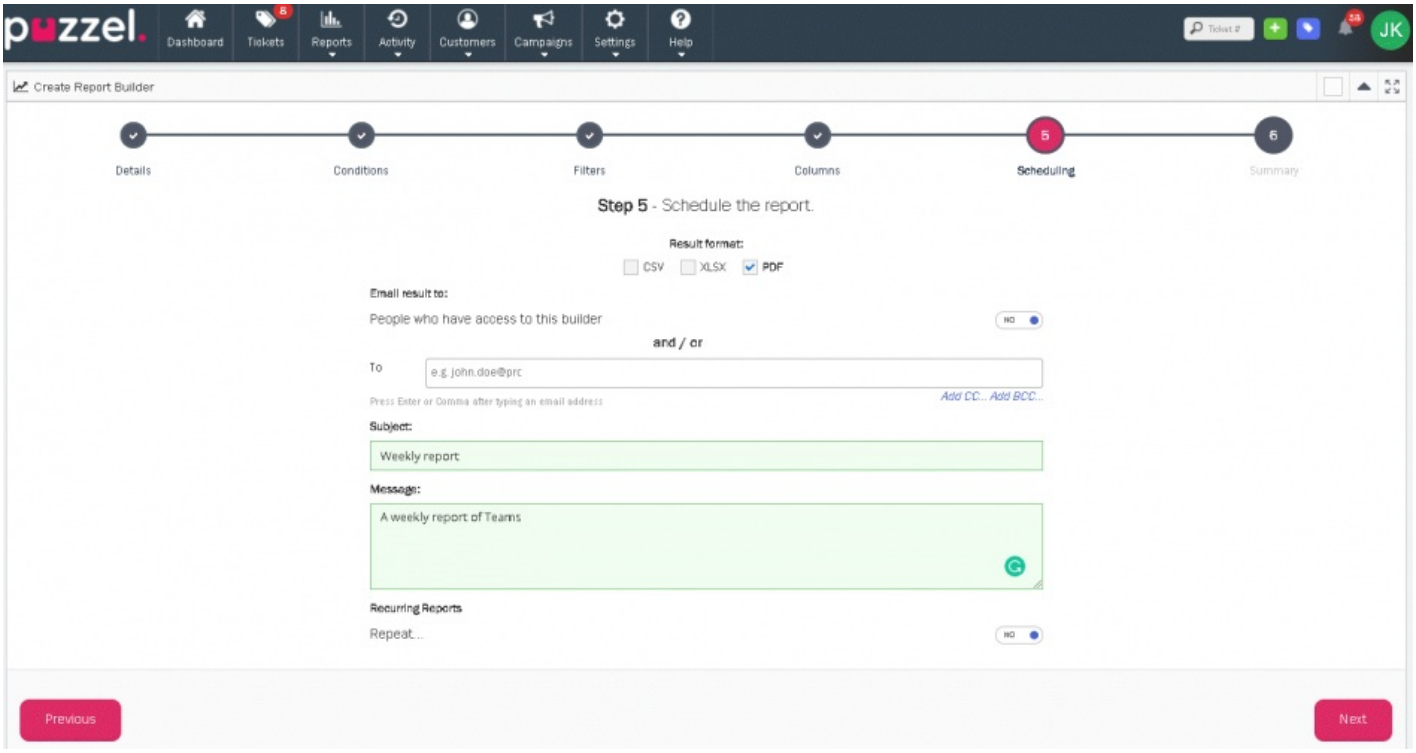

Email Result

By turning on this option you can choose to email the report from this Report Builder to contact(s) of your choice. Enter the Email address in the **To** field and optionally in the **CC** and **BCC** filed by selecting **Add CC…** and **Add BCC…**

You must enter a Subject and Message at this Step even if you choose not to Email the Results as the Results are sent to your User Email address by Default.

Recurring Reports

Turn this Option On to set your Report Builder to automatically generate a new Report at a frequency of your choice. With this option Turned On, you first Report will not be generated until the end of the frequency you have selected. E.g. If you set the Report Builder to Repeat every week, the first Report will not be generated until the end of the week. If set to Repeat every month, the first report will not be generated until the end of the month.

If you keep this Option turned Off, your first Report will be generated once the Report Builder is created. You will then be able to manually generate a new Report from this Builder at the click of a button.

Step 6

Review the Criteria and selections for your Report Builder. Once you're happy with everything, select **Finish**' to create your new Report Builder.

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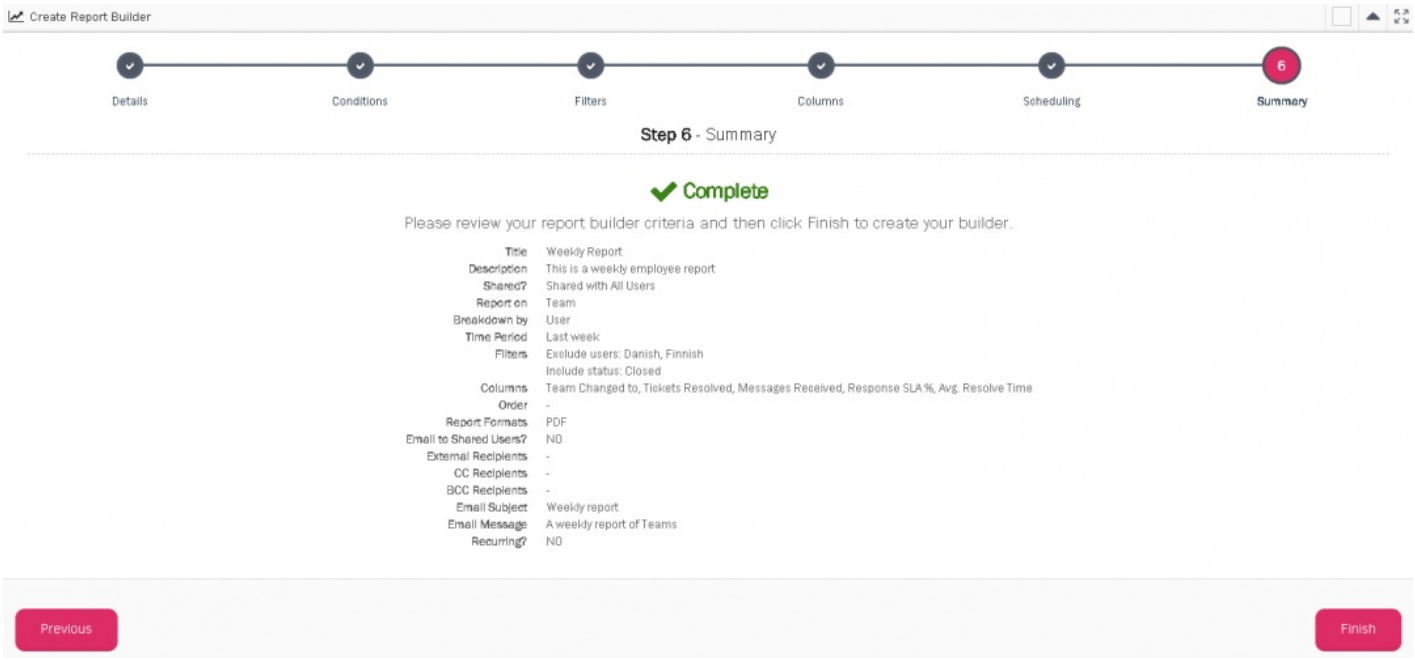

Additional Actions

There a set of additional actions for each Report Builder you own. These actions are slightly different for Recurring and Non-Recurring Report Builders.

Recurring

- **Unsubscribe/ Subscribe** – Stop or Start receiving email notifications & attached results when a new Report is generated.
- **Pause/ Resume Generation** – Stop or Start automatic Report generation.
- **Edit** – Update the Title, Description, who the Report Builder is Shared with, who the Report result are emailed to, and the Subject & Message for the sent Email.
- **Remove** – Remove this Report Builder from the System.

Non-Recurring

- **Unsubscribe/ Subscribe** – Stop or Start receiving email notifications & attached results when a new Report is generated.
- **Run** – Manually Run the Report Builder to create a new Report.
- **Edit** – Update the Title, Description, who the Report Builder is Shared with, who the Report result are emailed to, and the Subject & Message for the sent Email.
- **Remove** – Remove this Report Builder from the System.

Reports

Report Builder reports are viewed by clicking on the Report Builder option under**Reports** in the main menu. This list consists of available Reports created by yourself and also the reports shared with you/your team.

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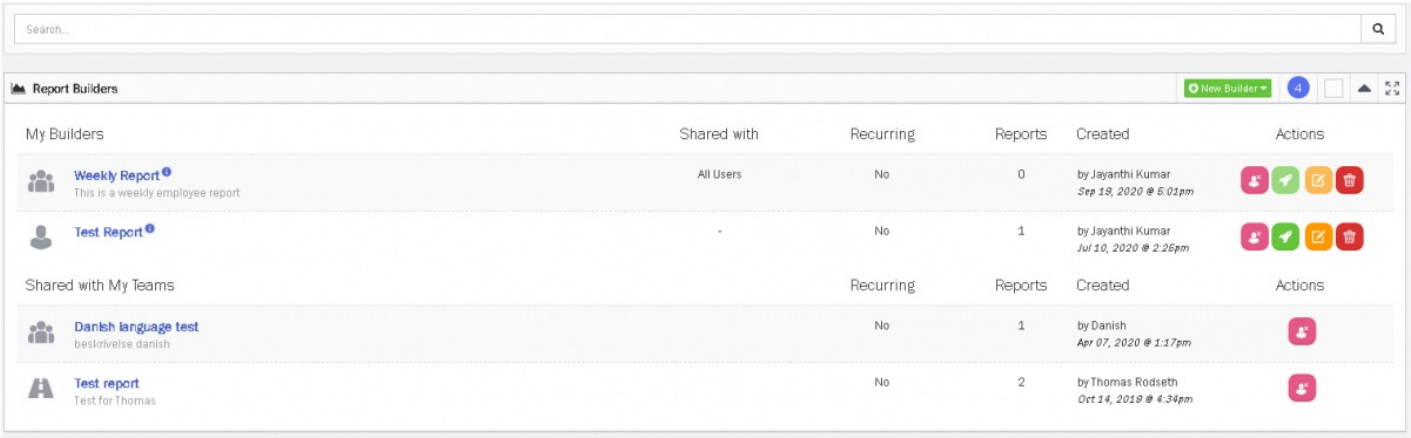

The Results are interactive allowing you to sort the results by selecting the Column header. Results broken down by a subgroup can be expanded by selecting the '**+**' icon, and collapsed by selecting the '**-**' icon.

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