(Formerly GetHelp)
Version 9.1 Release Documentation

Frontline Education is happy to announce the release Help Desk Management v 9.1 which includes the following enhancements:

- Custom Reporting (Beta)
- Improved Prompt Language - "How may we help you?"

This document outlines key capabilities, setup information, feature scope, and usage tips to help users understand and use this functionality effectively.

Custom Reporting (Beta)

The **Custom Reporting (Beta)** feature is designed to give districts greater control over how they access and analyze Help Desk data. By moving beyond static, pre-configured reports, this new functionality allows users to build custom reports that align with their specific workflows, information needs, and decision-making processes.

Whether you're a technician tracking resolution metrics or an administrator identifying trends across service groups, Custom Reporting enables more targeted insights — without the need for IT or vendor intervention. With a familiar and intuitive interface, Custom Reporting puts the power of flexible, self-service reporting directly in your hands.

Custom Reporting (Beta) Release Notes:

A. Introduction

Help Desk version 9.1 introduces **Custom Reporting** (**Beta)** available to all Help Desk Management customers. This first-release (Beta) gives users the ability to create, customize, and manage private reports with a flexible drag-and-drop builder while we continue to expand sharing and management features. This is the first step in providing greater reporting flexibility to support district workflows and data analysis needs.

Known Limitations in Beta:

- **Private reports only** – Reports are only visible to the user who created them; sharing is not yet supported.
- **15-field limit** – Maximum total across all four quadrants (Filters, Columns, Rows, and Values).
- **One quadrant per field** – A single field can appear in only one quadrant at a time (e.g., "Resolved On" can't be used in both Filters and Columns).
- **Report names are permanent** – Report names cannot be edited once saved. Use Save As to create a renamed copy.
- **No delete/archive** – Saved reports cannot be deleted or archived. This is a known limitation and planned for a future release.
- **Limited field availability** – Certain fields are currently not available in the beta (e.g., attachments, private notes, detailed time tracking). See "M. Fields Not Available in Beta" for the full list.
- **No report sharing or scheduling** – Functionality like sharing, scheduled delivery, and deleting a report will be included in future updates.
- **Browser support limited** - Custom Reporting (Beta) is supported on Google Chrome, Safari, and Microsoft Edge. Firefox is not supported at this time.

Why "Beta"?

This label lets us release working functionality now while we:

- Gather real-world feedback on usability and performance.
- Finish features such as report sharing, name editing, and field limitations.
- Tune load times on very large datasets.

B. User Permissions

In this release, the **Analytics Permissions** section in Roles Management has been renamed to **Reporting**. Under the new Reporting heading you'll now find two permissions: **View Analytics Page** and **Create Custom Reports.**

Before users can access the new Custom Reporting page, make sure their roles include this Reporting permission.

Reporting Permissions:

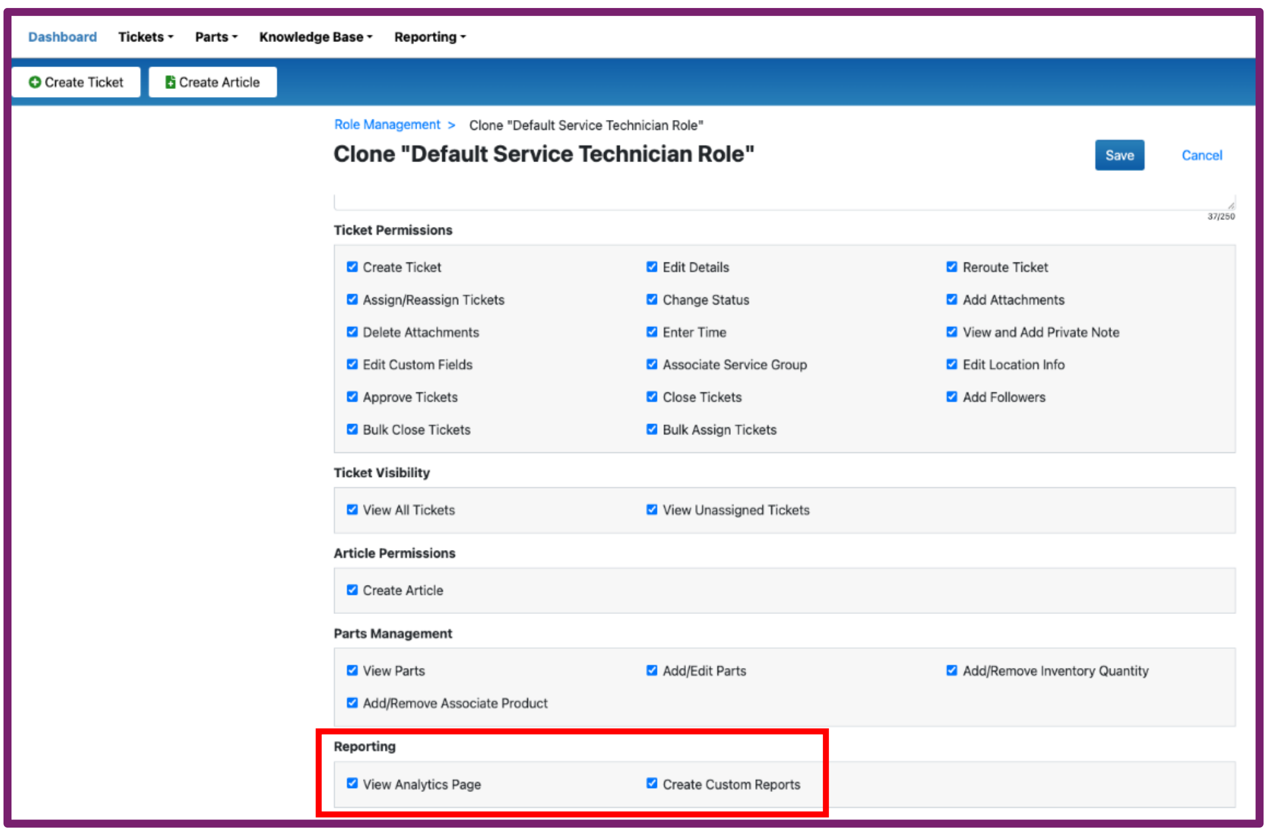
Permission Name	What It Enables
View Analytics Page	Provides access to view and edit all pre-built (canned) reports under **Reporting** > **Analytics**.
Create Custom Reports	Provides access to **create**, **edit**, and **save** custom reports under **Reporting** > **Custom Reporting**.

Default Behavior for Service Admin

As a **Service Admin** user, you will automatically have access to both **View Analytics & Custom Reporting.** This permission for Service Admin cannot be edited/removed.

Default Behavior for Technicians

If you are using the **Default Service Technician role**, both permissions are **enabled by default** with the version 9.1 update. This means technicians will automatically be able to access the Analytics page and build Custom Reports unless custom roles have already been applied.



IMPORTANT: Role based restrictions around Problem Type Access, Sites, and Service groups do not apply for Custom Reporting. For example, if a Technician only has access to certain sites, in

Custom Reporting & Analytics, the Technician will be able to see all sites not just their assigned sites.

Custom Roles (Admin Action Required)

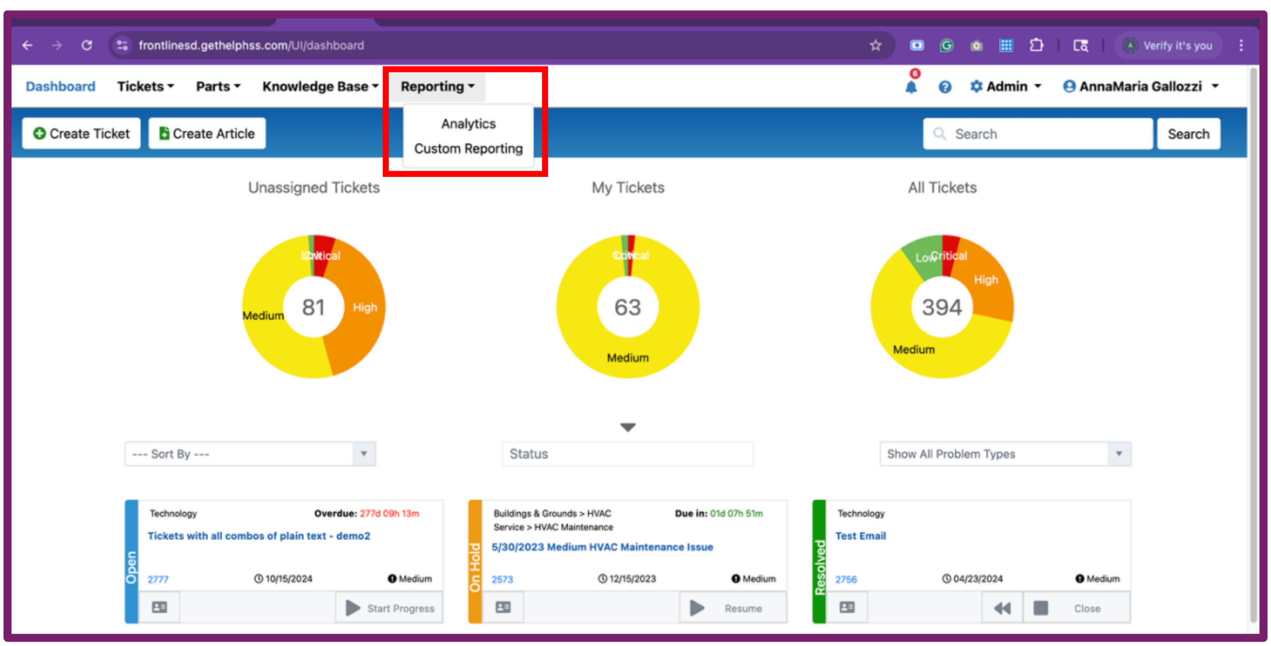
If your district has created **custom roles or modified permissions**, the new Custom Reporting permissions **will not be automatically turned on**. If the permissions are disabled, the Reporting top navigation will be hidden. If one permission is disabled, then that option will be hidden from the drop-down.

To enable Service Technicians to access Custom Reporting:

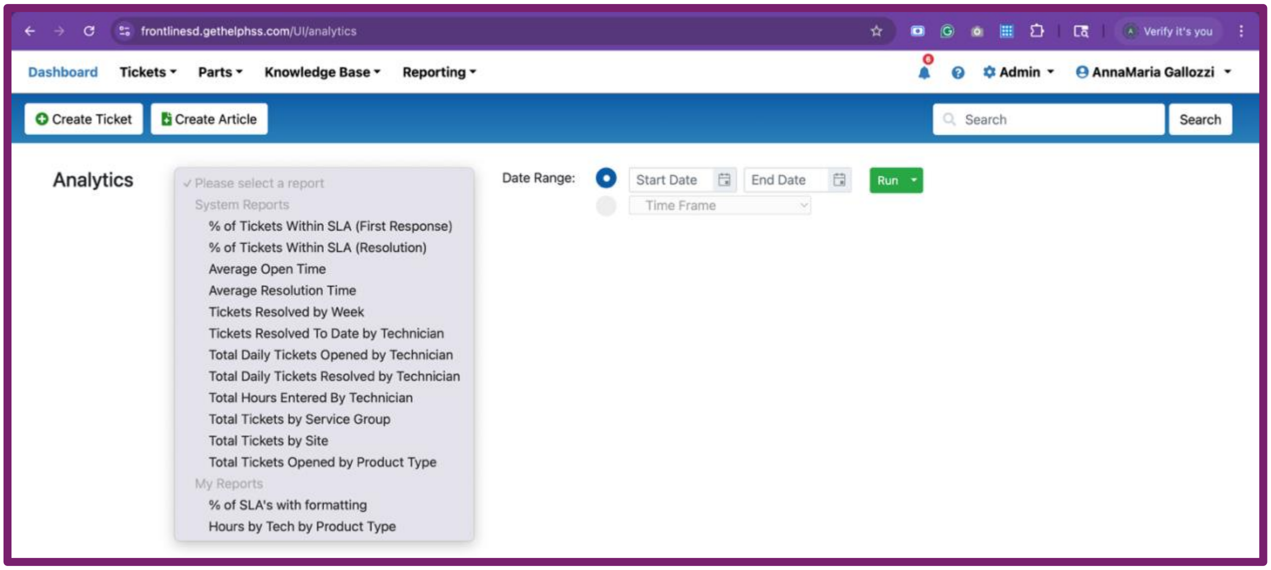
1. Go to **Admin > User Management > Roles**
2. Click **Edit** for the relevant user role you want to enable access to Custom Reporting
3. Scroll to the **Reporting** section (formerly Analytics Permissions)
4. Check the box for:
   - ✅ **Create Custom Reports**
5. Click **Save**

C. Reporting - Top Navigation

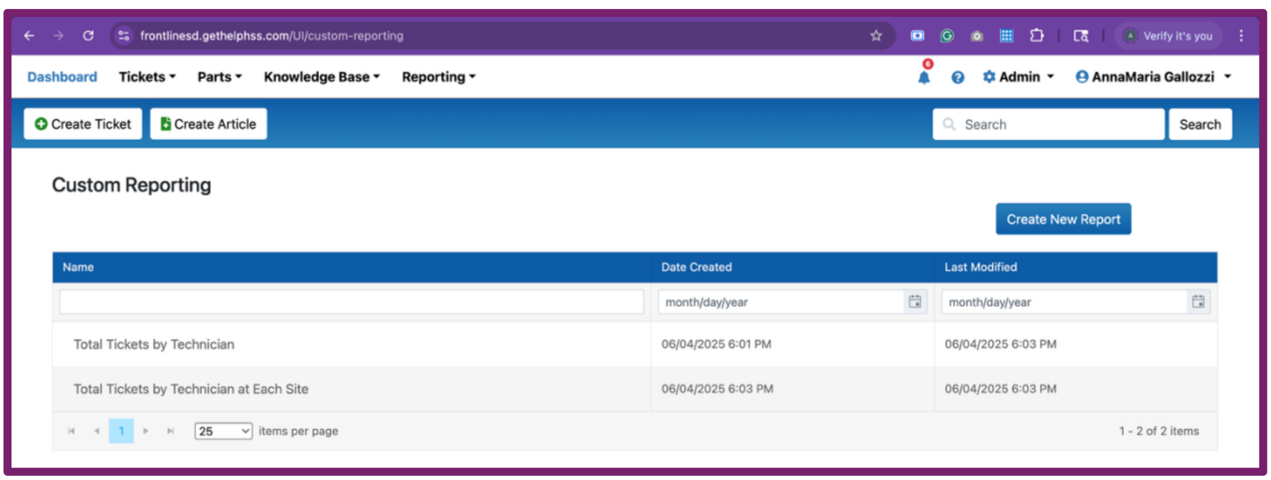
In version 9.1, the **Analytics** button in the top navigation has been renamed to **Reporting** to reflect our expanded reporting capabilities. When you click Reporting, you'll see two options: Analytics and Custom Reporting.



- **Analytics** – preserves all existing reporting functionality. Select Analytics to open the familiar list of pre-built (canned) dashboards and reports, with the same ability you've always had to edit and save them.



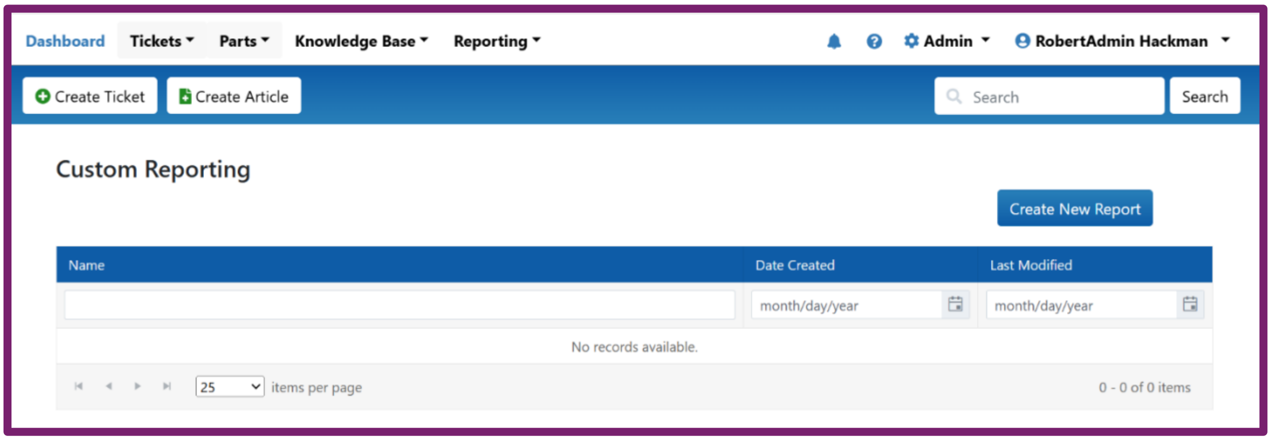
- **Custom Reporting** – New version 9.1 feature. Select **Custom Reporting** to view the **Custom Reporting Grid**, where you can access, build, and manage fully personalized reports based on your Help Desk data.



D. Custom Reporting - Saved Reports Grid

Select **Custom Reporting** from the **Reporting** tray in the top navigation, to view the **Custom Reporting Saved Reports Grid** — your personal space for accessing and managing the reports you've built.

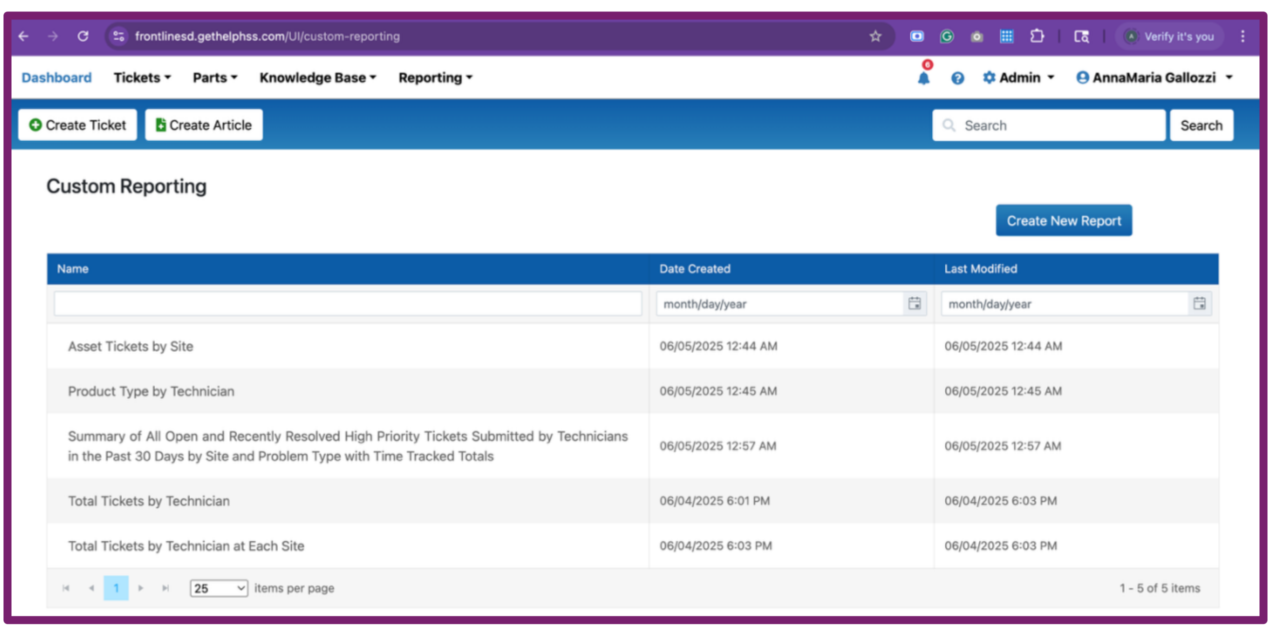
- If you haven't saved any reports yet, the grid show “No records available.”
- Once you save reports, they’ll be listed here in alphabetical order.



Grid Features

You can sort and filter your reports using each column header in the grid:

- Name
- Date Created
- Last Modified



Things to Know About Saved Reports

- **Reports are Private**
  All saved reports are tied to the individual user who created them. **They cannot currently be shared** with other users in your district (this is being considered for a future release).
- **Report Names Are Permanent**
  Once saved, a report's name **cannot be edited**. To rename a report, open it, make any desired changes, and use **"Save As"** to create a new version under a different name.
- **No Deletion or Archiving (Yet)**
  At this time, reports **cannot be deleted or archived**. This is a known limitation and is under review for a future enhancement.

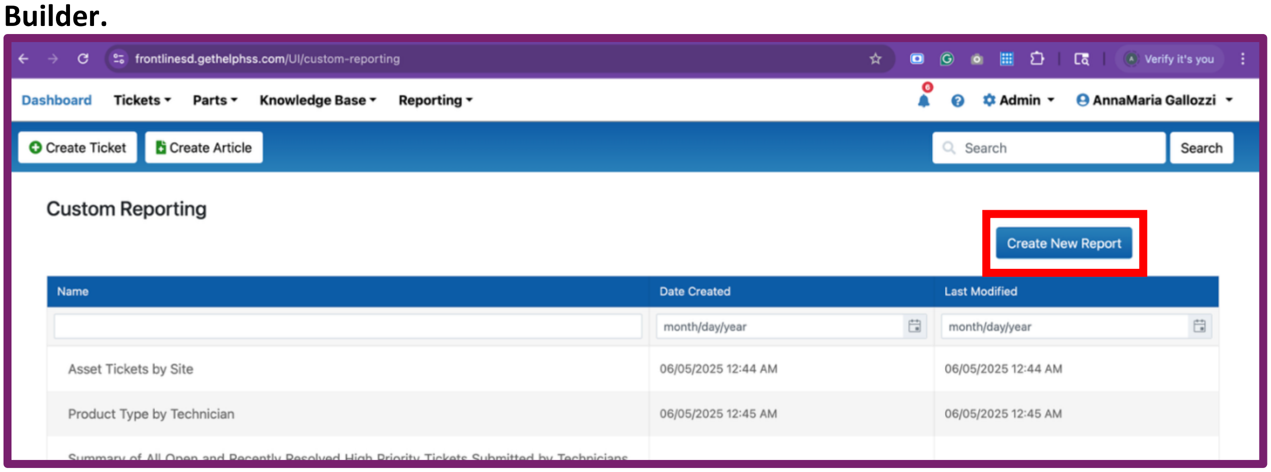
Tip: Use a clear and consistent naming convention when saving reports to help keep your grid organized as more reports are added.

E. Create New Report

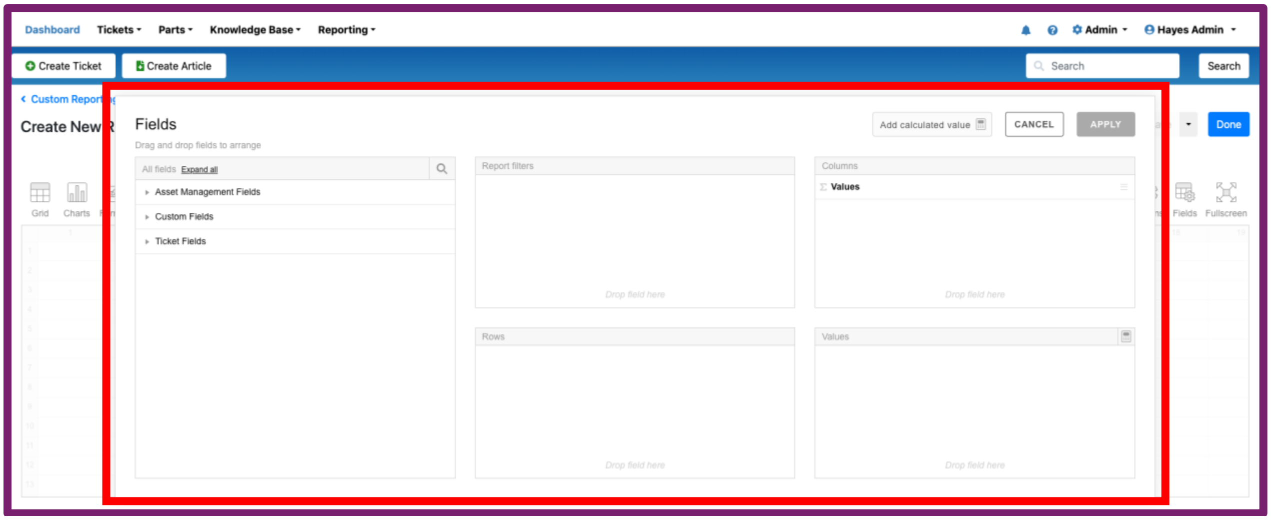
Users can now create customized reports using a streamlined interface that supports:

- **Field Selection**: Choose from a list Asset Management Fields, Custom Fields, and Ticket Fields.
- **Dynamic Configuration**: Configure Filters, Columns, Rows, and Values using a responsive interface with lazy-loading to support performance.
- **Field Limit**: A maximum of **15 fields** can be selected per report. If more are selected, users will be prompted to reduce the selection.
- **Timeframe Default**: Reports will default to display data from the **previous 7 days** (Monday through Sunday) unless the user selects a custom date range.

When you click **Custom Reporting** and choose **"Create New Report"**, you'll enter the **Report Builder.**



The **Report Builder** is the main workspace where you define what data appears in your report and how it's organized. The builder is divided into **Fields** you can drag-and-drop into **four key quadrants**: **Filters, Columns, Rows, and Values**.



- Click **Cancel** to exit back to the **Custom Reporting** page**.**
- Use the **Apply** button to preview results**.** No changes are committed until you click **Save As**.

F. Understanding Fields

Choose from a list Asset Management Fields, Custom Fields, and Ticket Fields.

IMPORTANT: Some fields are not currently available in the reporting beta. The following areas are **excluded** and cannot be used in custom reports at this time:

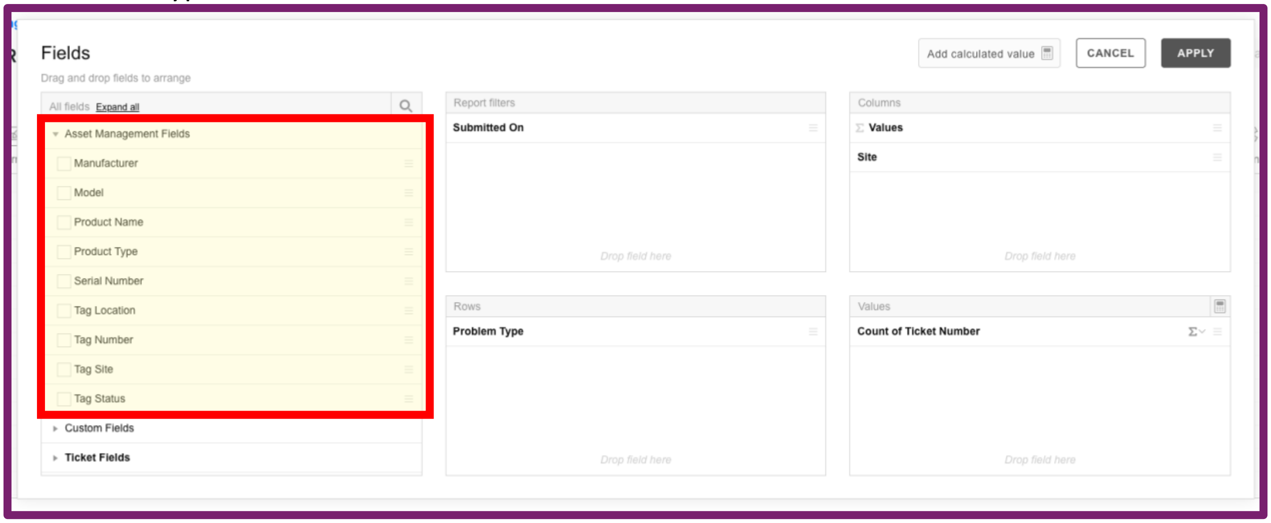
- Public Comments
- Private Notes
- Ticket History
- Attachments
- Time Tracked (Detailed Entries) - you are not able to report on individual time entries per technician.
- Parts Usage or Management
- "Site Type" field under device details

Asset Management Fields

- Manufacturer
- Model
- Product Name
- Product Type
- Serial Number
- Tag Location
- Tag Number

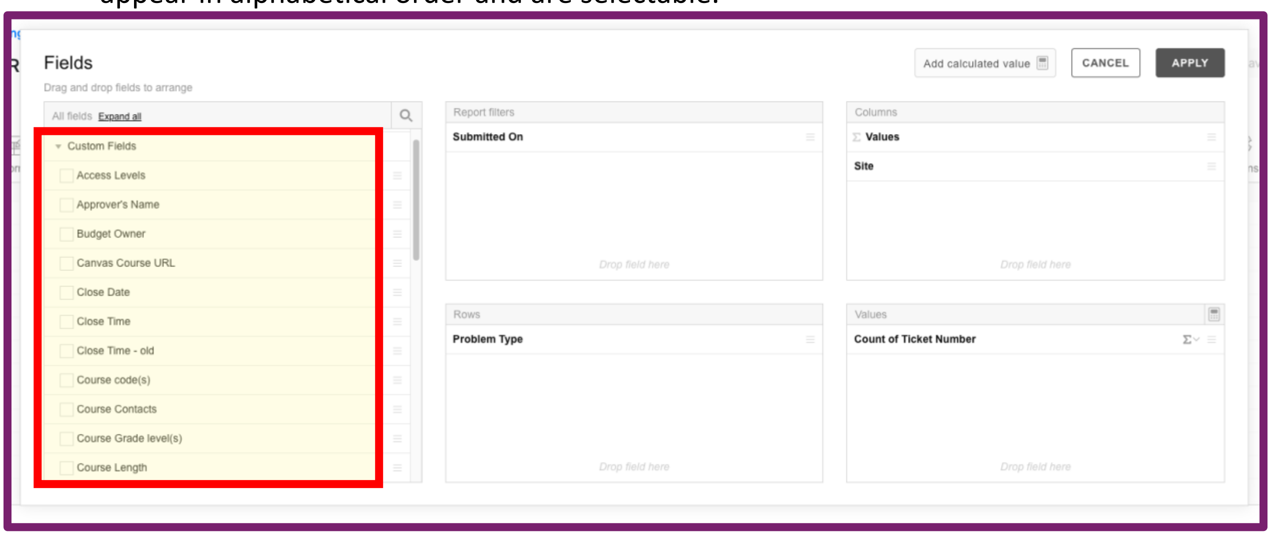
- Tag Site
- Tag Status

Note: "Site Type" field is not included in this version 9.1 release.



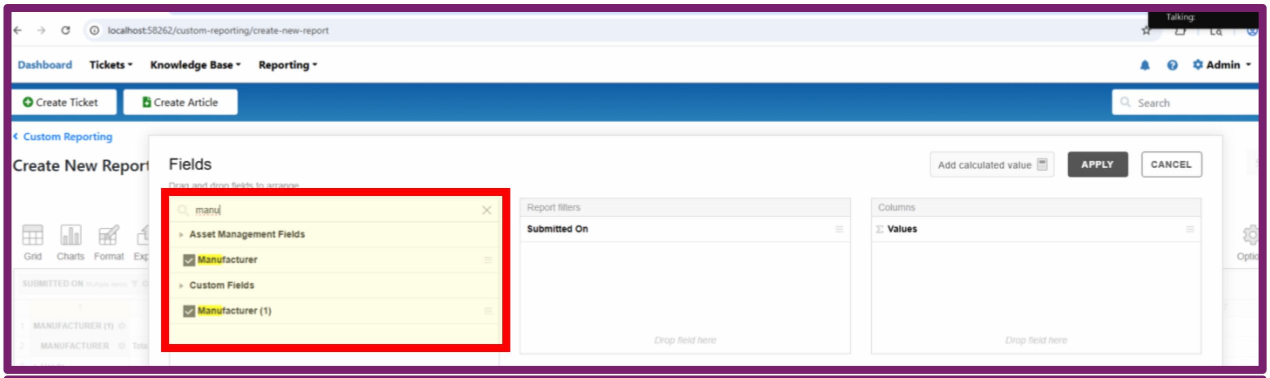
Custom Fields

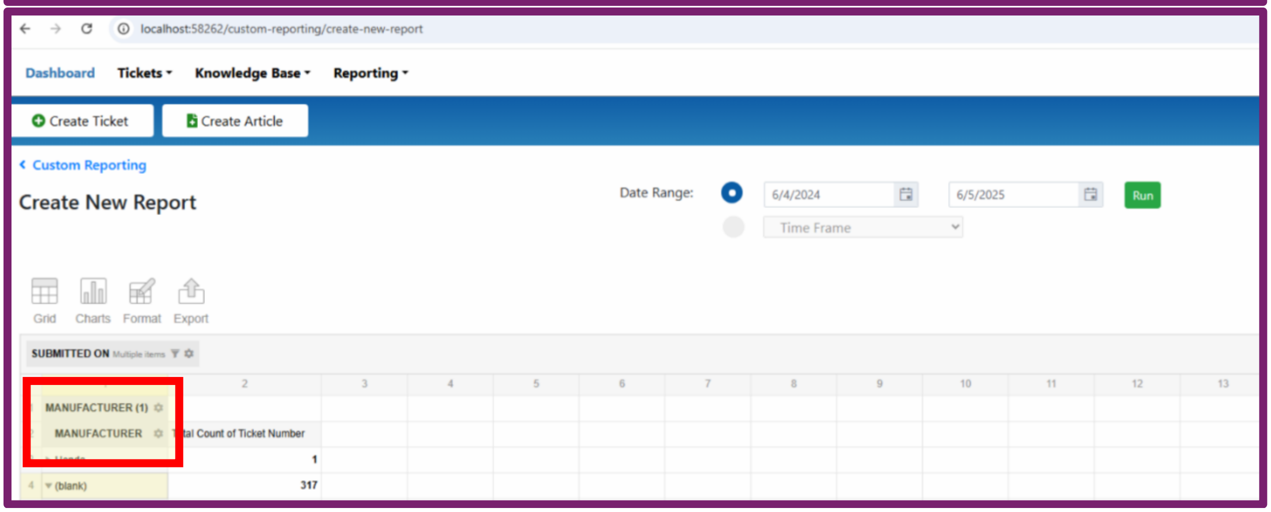
- All available custom fields (created by the district) based on district configuration will appear in alphabetical order and are selectable.



Note(s):

- If your Custom Fields share the same name as an Asset Management or Ticket Details fields, then there will be a number placed after the name in parentheses. For example: Manufacturer (1)
- If a Custom Field is renamed, the report will need to be edited to update the custom field and apply the changes. Renaming the field will cause the report to become ineffective.

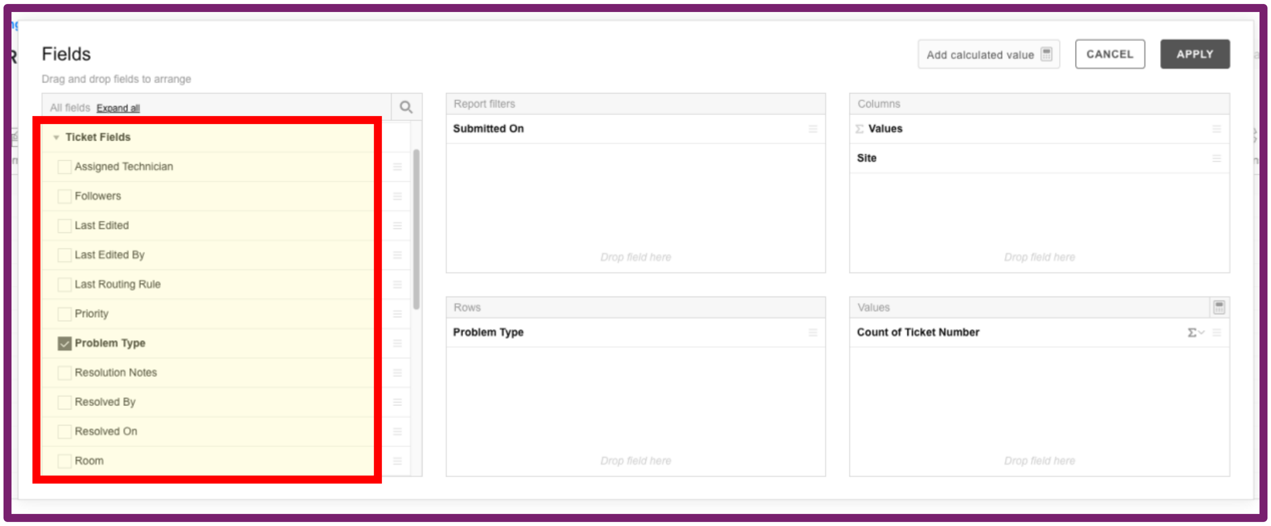




Ticket Fields

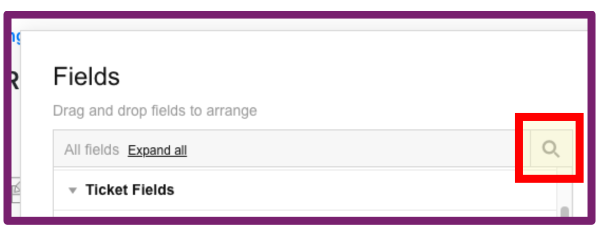
- Assigned Technician
- Followers
- Last Edited
- Last Edited By
- Last Routing Rule
- Priority
- Problem Type
- Resolution Notes
- Resolved By
- Resolved On
- Room
- SLA Target Date
- Service Groups
- Site
- Source
- Status
- Summary
- Submitted By

- Submitted On
- Ticket Active
- Ticket Number
- Time Tracked (In hours)
- Time Tracked (In Minutes)

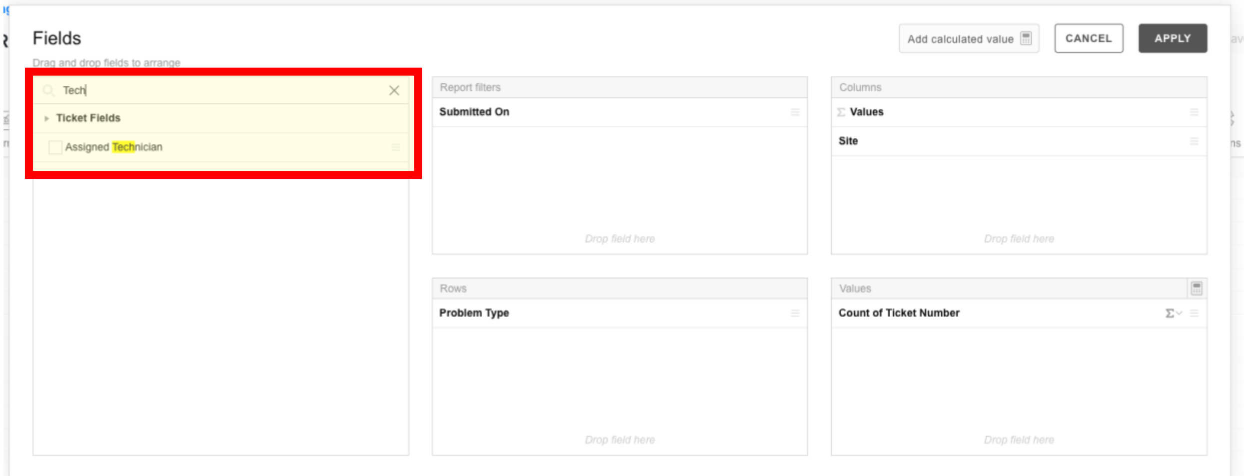


Searching for Fields

1. When you're building a report, you no longer have to scroll through long lists of fields—just click the little magnifying-glass icon at the top of the Fields panel.



2. Start typing the name you need and the list will filter in real time to show only matching fields.
3. Once you see the field you want, simply check its box (or drag it into your quadrant) to add it to your report.
4. To clear your search and see all fields again, click the "X" in the search box.

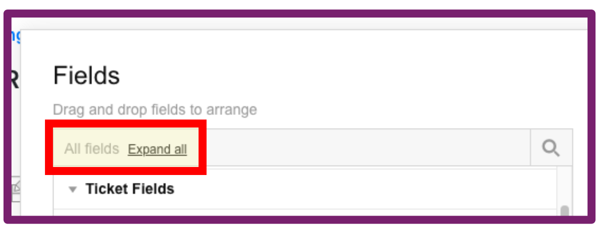


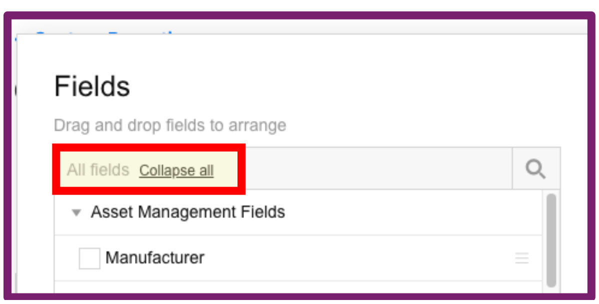
All Fields: Expand all & Collapse all

Users can easily manage field visibility when building reports using the **Expand All** and **Collapse All** options in the **Fields** panel.

- **Expand All**: Displays all available fields under each category, making it easier to browse and locate what you need.
- **Collapse All**: Hides the fields and shows only the category headers, reducing visual clutter once you've selected your fields.

These options provide better navigation and control, especially when working with long or complex field lists.





G. Understanding Configuration Options

Configure Filters, Columns, Rows, and Values using a responsive interface that lazy-loads data for top performance.

Key Rules and Limitations of the Quadrants

- **Each field can only be used in one quadrant at a time.**
  For example, “Resolved On” can appear in Filters or Columns, but not both simultaneously. Some fields—such as “Submitted On”—may be permitted in multiple quadrants depending on report logic.
- **The 15-field limit applies across the entire report**—this includes Filters, Columns, Rows, and Values.
- **Use the Apply button to preview results.**
  No changes are committed until you click **Save** or **Save As**.

1. Report filters

Purpose:
Report filters control which records are included in your report. They are used to narrow down your data based on criteria that matter to you. You can see on the “All Fields” side panel which fields are selected by their checkmark. In order to build a report, the quadrant needs to have a minimum of a field in Rows, Columns, and Values. If they do not have a field in one of those quadrants, a report will not render.

Default Setup:
All new reports default with a **“Submitted On”** filter set to show tickets for the **previous 7 days (Sunday–Saturday)**. When you want to change the date, you can do that per report on the top of the report through the **“Date Range”** options or on the grid with the **“Submitted On”** filter.

How to Use:

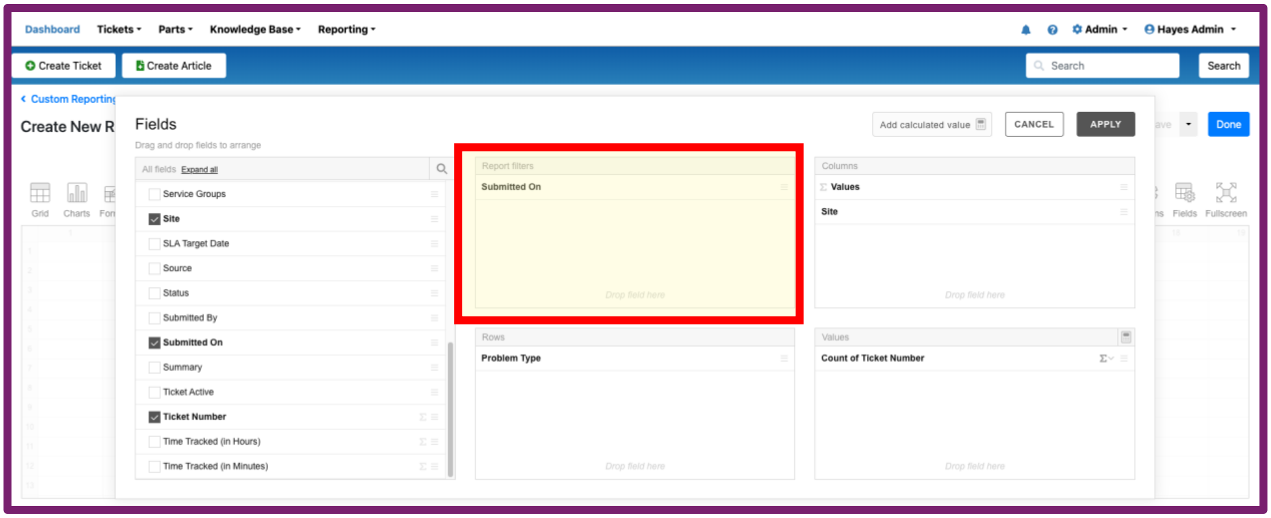
- Drag one or more **Fields** into the **Report filters** quadrant.
- Define your filtering criteria by clicking on the gear or filter icon next to your filter preset name on the report grid (e.g., Priority = High; Site = Lincoln Middle School, Keller Middle School, Williams Middle School)
- “Submitted by” is a required report filter and is saved on the backend. When building your report, you will not see the field in Report Filters until after you run the report for the first time.
- Adding a field to report filters is not required since Submitted by is on the Report Filters in the backend.
- You can **drag to reorder** row fields directly within the quadrant.
- **Double-click** a field to remove it from the quadrant.

Useful Report filters Fields:

- Assigned Technician
- Custom Fields (such as Department or Location Type)

- Priority or Status
- Site, Room, or Service Group
- Submitted On or Resolved On

Tip: Use **Report filters** to build focused reports – like "Open Tickets this Month" or "Resolved Tickets by Technician" - and save them as reusable templates.



2. Columns

Purpose:
Columns group your data into vertical categories based on a field's unique values—perfect for side-by-side comparisons so you can compare categories at a glance.

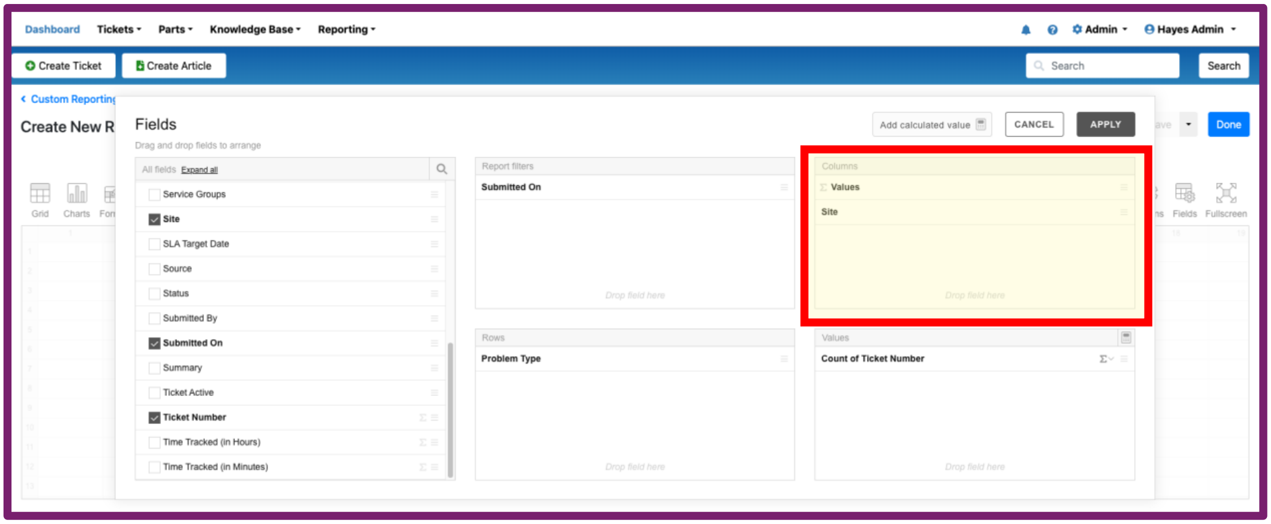
When to Use:
Use columns whenever you want to evaluate differences across a data point.

How to Use:
- Drag a Field into the **Columns** quadrant; the report will create one column per unique value.
- This is not a required quadrant to add a Field in
- You can **drag to reorder** row fields directly within the quadrant.
- **Double-click** a field to remove it from the quadrant.

Useful Column Fields:
- Site (displays a separate column for each site)
- Status (compare ticket statuses across rows)

Tip: Keep columns to a minimum—too many can clutter your view.

Note: The **"Values" placeholder** is **not a field from your data** — it's a **container** or **group label**. It shows up when **aggregated fields** (like Sum of Amount, Count of Items, etc.) are dropped into the **Columns quadrant** of the pivot.



3. Rows

Purpose:
Rows define how your data is grouped down the left-hand side of the report. Rows break out records into horizontal groups so you can drill into specific categories.

When to Use:
Use the Rows quadrant when you want to organize data in a **hierarchical** or **tiered format**—such as grouping tickets by technician, then by issue type. Fields added to Rows are grouped in the order added. You can drag fields to re-order them and control nesting.

Note: The Rows quadrant is **optional**. You can run a report without any fields in this quadrant as long as at least one field is added to **Values**.

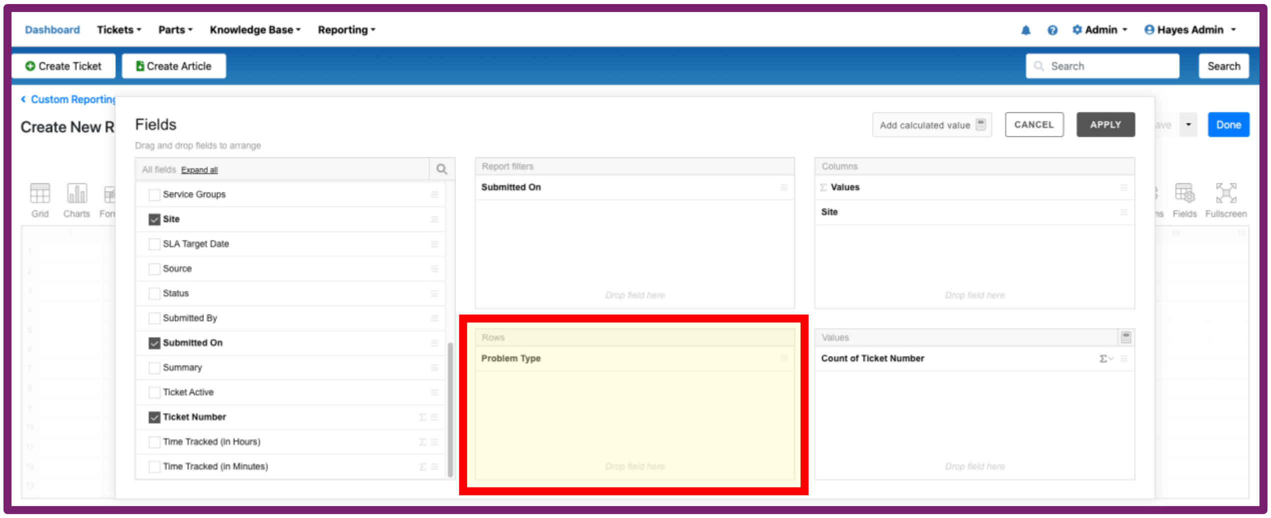
How to Use:

- Drag one or more fields into the **Rows** quadrant; the report will display one row per unique value and nest additional fields as subgroups.
- You can **drag to reorder** row fields directly within the quadrant.
- **Double-click** a field to remove it from the quadrant.
- There is also **no limit** to the number of nested row levels, as long as your total number of fields stays within the **15-field maximum** across all quadrants.

Useful Rows Fields:

- Assigned Technician (view ticket counts by technician)
- Problem Type (see breakdown of issue types by group or site)

Tips: Use multiple row fields to build tiered groupings—like tickets grouped first by Site, then by Technician. There is no default field in the Rows quadrant when the report is first opened. Fields must be added manually to customize the row breakdown.



4. Values

Purpose:
The Values quadrant determines what is calculated or summarized in your report - such as totals or distinct counts.

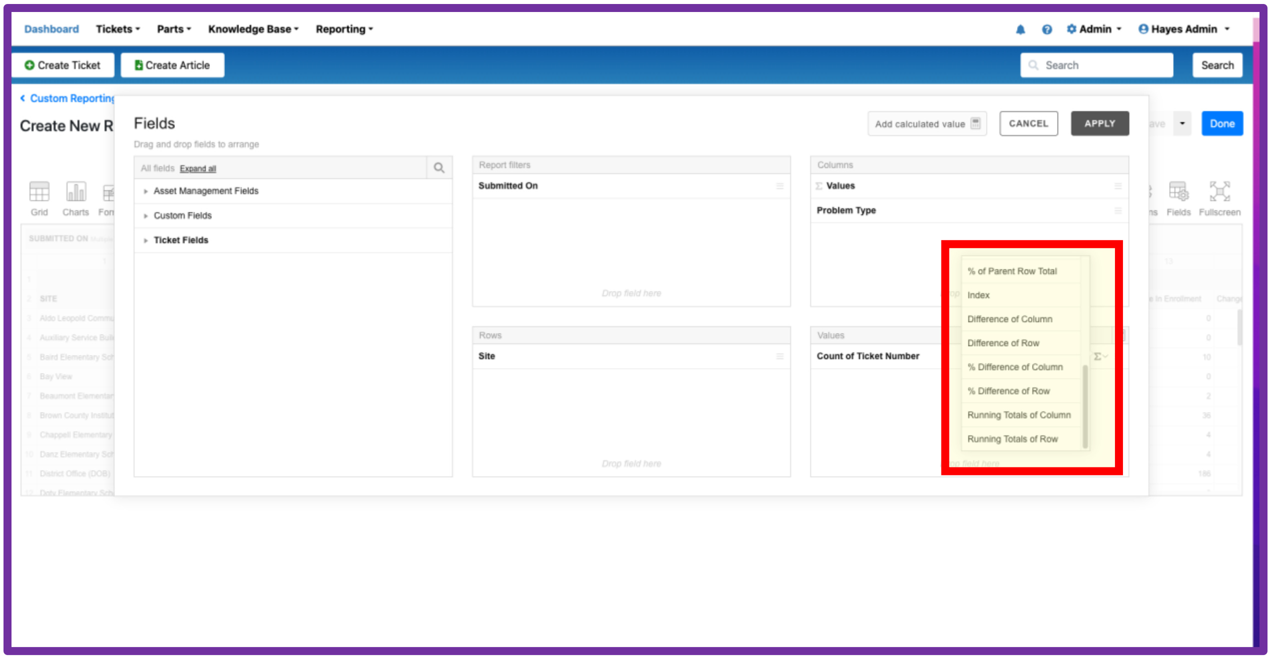
When to Use:
Use Values when you want to measure or summarize records. Most users use this area to show the **count of tickets**.

> **Note**: At least one field is required in the **Values** quadrant to generate totals or metrics in your report.

How to Use:

- Drag a field (like Ticket Number) into the **Values** quadrant**.**
- Choose the aggregation type (Count, Count Distinct, etc.) by clicking on the equation symbol to the right of your field name. The default will always be the first option on the list, which will depend on what the field in Values is.
- You can **drag to reorder** row fields directly within the quadrant.
- **Double-click** a field to remove it from the quadrant.
- There is also **no limit** to the number of nested row levels, as long as your total number of fields stays within the **15-field maximum** across all quadrants.

Tip: There is no default field in the Values quadrant when the report is first opened. Fields must be added manually to customize the value summary or calculation.



Aggregation Options:

- **Count**: Tallies the total number of records, including duplicates.
- **Distinct Count**: Counts only **unique values** in the selected field. *Example: Number of different technicians assigned.*
- **Sum**: Adds up all numeric values in the selected field. *Example: Total time tracked (if available).*
- **Average:** Calculates the **mean value** of a numeric field. *Example: Average resolution time.*
- **Min**: Displays the **lowest value** in the field. *Example: Earliest submission date or shortest duration.*
- **Max**: Displays the **highest value** in the field. *Example: Latest update or longest resolution time.*

Percentage-Based Aggregates: These calculate proportions relative to the entire report or a section of it.

- **% of Grand Total**: Shows each value as a percentage of the overall total.
- **% of Column:** Compares each value to the total of its **column**.
- **% of Row:** Compares each value to the total of its **row**.
- **% of Parent Column Total:** Calculates the percentage each value contributes to its **grouped column parent**.

Change & Trend Aggregates: These options are helpful for identifying increases, decreases, or progress over time.

- **Index**: Generates a relative ranking or score to compare values contextually. *Used for analysis rather than hard totals.*
- **Difference of Column:** Shows the change in value between the current and previous **column** entry.

- **Difference of Row:** Shows the change in value between the current and previous **row** entry.
- **% of Difference of Column:** Shows percentage change between adjacent column values.
- **% of Difference of Row:** Shows percentage change between adjacent row values.
- **Running Totals of Column:** Adds values cumulatively **across the column**, from left to right.
- **Running Totals of Row:** Adds values cumulatively **down the row**, from top to bottom.

Note: Aggregation options are determined by the **type of field** you select.

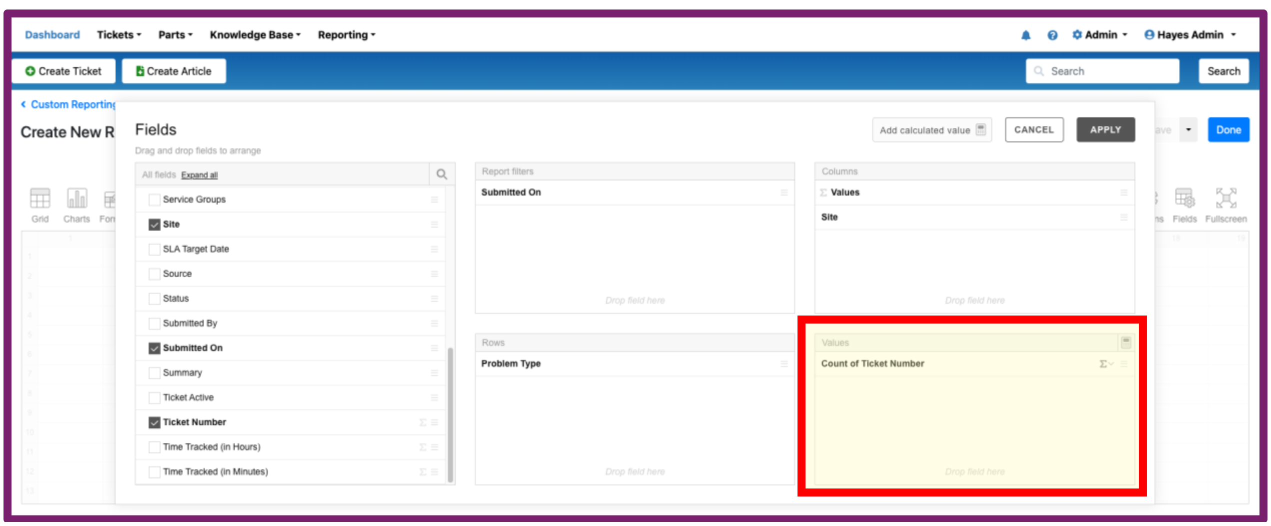
- **Numeric fields** (such as time tracked or counts) support full aggregation options including **Sum, Average, Min, Max**, and **Percentage/Trend calculations**.
- **Text or identifier fields** (like names, statuses, or manufacturers) support only **Count** and **Distinct Count**, since they can't be mathematically summarized.

Useful Values Fields:

- Ticket Number (Count): shows number of tickets per combination of Rows and Columns

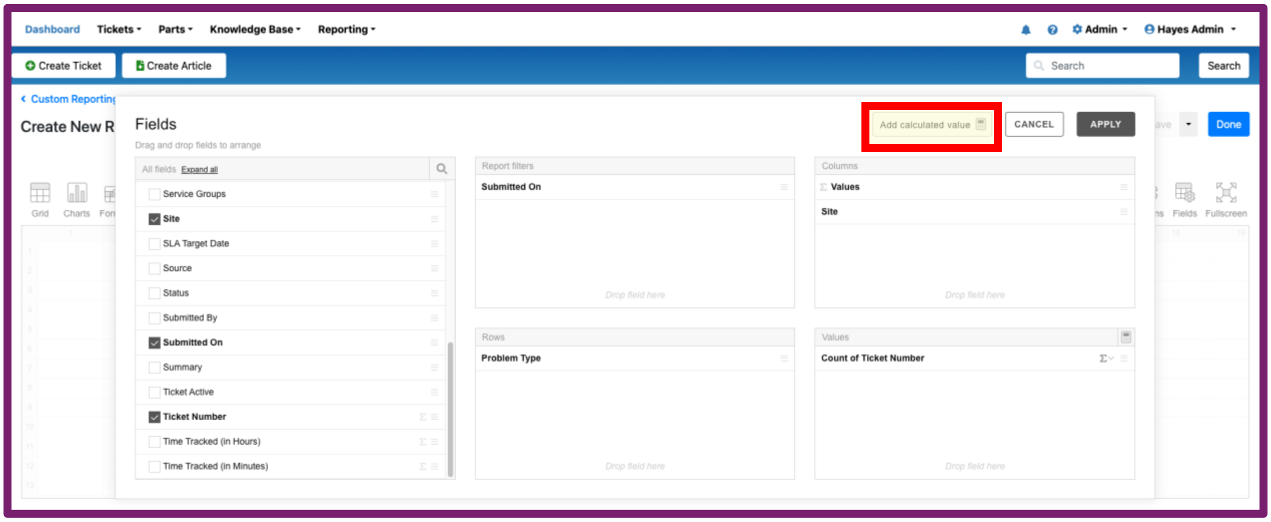
Tip: For the most flexibility, use numeric fields in the **Values** quadrant. Use **Values** alongside **Rows** and **Columns** to generate pivot-style summaries like Ticket Count by Site and Technician

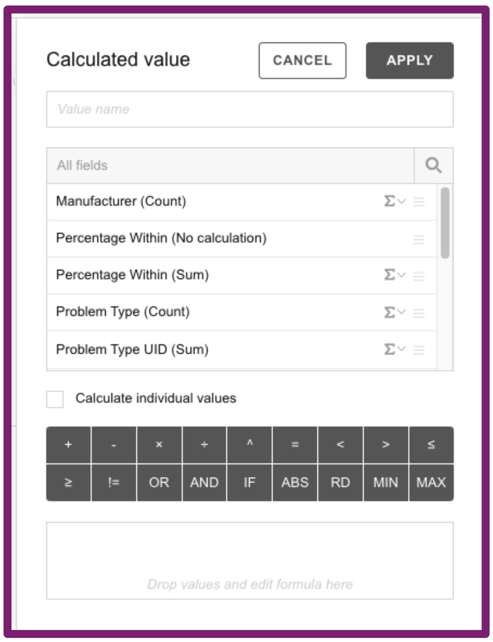
Note: Future enhancements may support other metrics (e.g., Sum of Time Tracked)



5. Add 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.





Recap: Key Rules to Remember

Before finalizing your report, keep these in mind:

- A field can only appear in one quadrant at a time.
- The 15-field maximum includes **all four quadrants**.
- Click **Apply** to preview; changes are only saved when **Save** or **Save As** is selected.

H. Preview and Customize

After you've clicked **Apply**, your report will generate a live preview. This is your opportunity to review layout, data formatting, and visualizations before committing changes.

Note: Changes are **not saved** until you click **Save** or **Save As**.

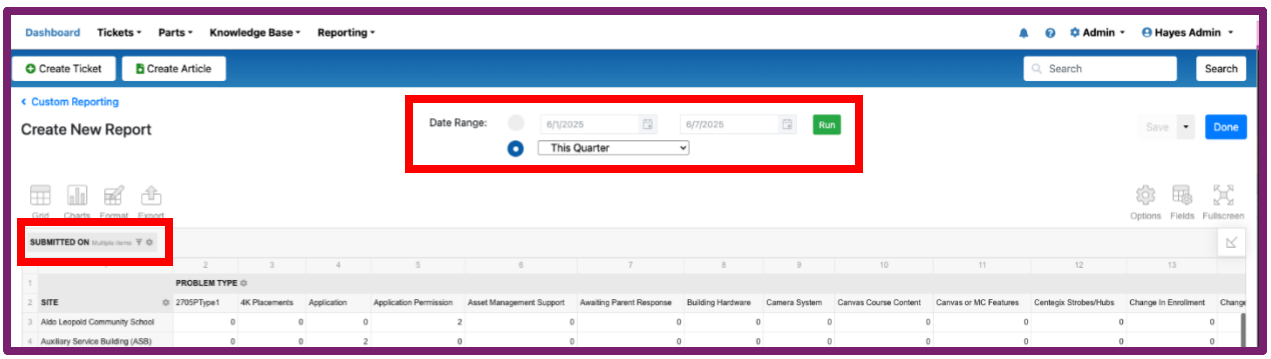
IMPORTANT: Don't click Done without saving your report.

- Clicking Done exits the report builder and returns you to the Saved Reports grid.
- If you haven't clicked Save or Save As at least once, **all your changes will be lost**.
- Always save your work before clicking Done to avoid starting over.

a. Date Range (top of page): The **Date Range** selector lets you define the time period for the data shown in your report. This feature offers both preset options for quick filtering and custom date entry for precise analysis.

At the top of the report preview, you'll see two options for setting your date range:

- Custom Range: Select exact start and end dates using the date picker fields.
    - **Default Setup:** All new reports default with a **"Submitted On"** filter set to show tickets for the **previous 7 days (Sunday–Saturday)**. When you want to change the date, you can do that per report on the top of the report through the **"Date Range"** options or on the grid with the **"Submitted On"** filter.
- Preset Time Frames: Choose from a dropdown list of commonly used periods. (e.g., This Week, Last Month, This Year).



1. **Custom Range Entry**
   Manually enter or select a **Start Date** and **End Date** for any custom timeframe.
   To use a custom range:
    1. Click the radio button next to the date fields.
    2. Enter or select the start and end dates.
    3. Click **Run** to refresh the report preview.

2. **Preset Time Frame Options**
   From the **Time Frame** dropdown, you can choose from:

- Today
- Yesterday
- This Week
- Last Week
- This Month
- Last Month
- This Quarter
- Last Quarter
- This Year
- All Time

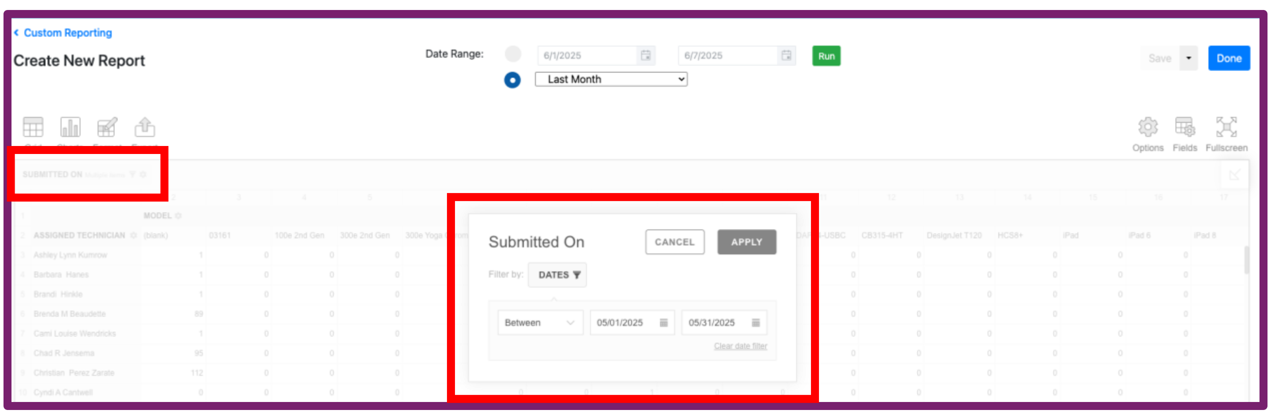
To use preset time frame option:

1. Click the radio button next to the time frame option.
2. Select the time frame from the dropdown.
3. Click **Run** to refresh the report preview.

Note: When saving a report, it will save with the time you rendered the report with. When you open the report after saving, you can update the date range on the top.

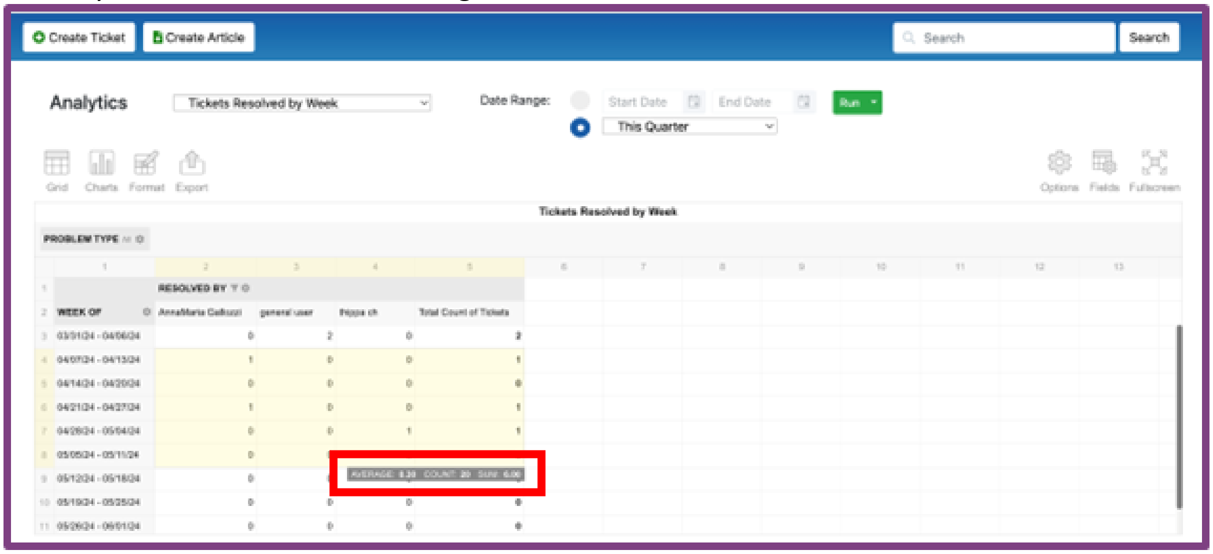
b. Grid (top left of report preview): The **Grid View** displays your report data in a structured table format and is the default layout for new reports. It's ideal for analyzing totals, trends, and groupings across rows and columns.

- **Report Filter**: Filters appear just above the table. In the example shown, **Submitted On** is the selected filter. Click the filter name (e.g., "Submitted On") to open the menu and apply changes.



- **Sort by Any Column:** Users can click on any column header to sort ascending or descending. This helps quickly identify top/bottom performers or trends (e.g., highest time tracked, most tickets submitted).
- **Expand/Collapse Hierarchies:** If your report uses nested Rows or Columns (e.g., Site → Room or Priority → Status), users can:
  - Click the **+ / – icons** in the grid to expand or collapse grouped sections.

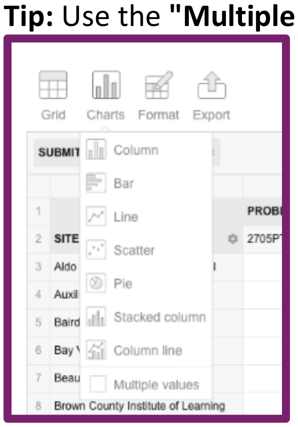
- This provides an easy way to view summary-level data without losing detail.
- **Right-Click Options:** Depending on configuration, right-clicking on a cell may offer:
  - Filter by value
  - Drill down
  - Exclude value
- **Use Grid Calculations:** In the Grid View, you can highlight one or more cells to automatically calculate **sums, averages, and counts**. These quick calculations appear at the bottom of the grid in a grey highlight bar and can be used for instant data validation or analysis without additional configuration.



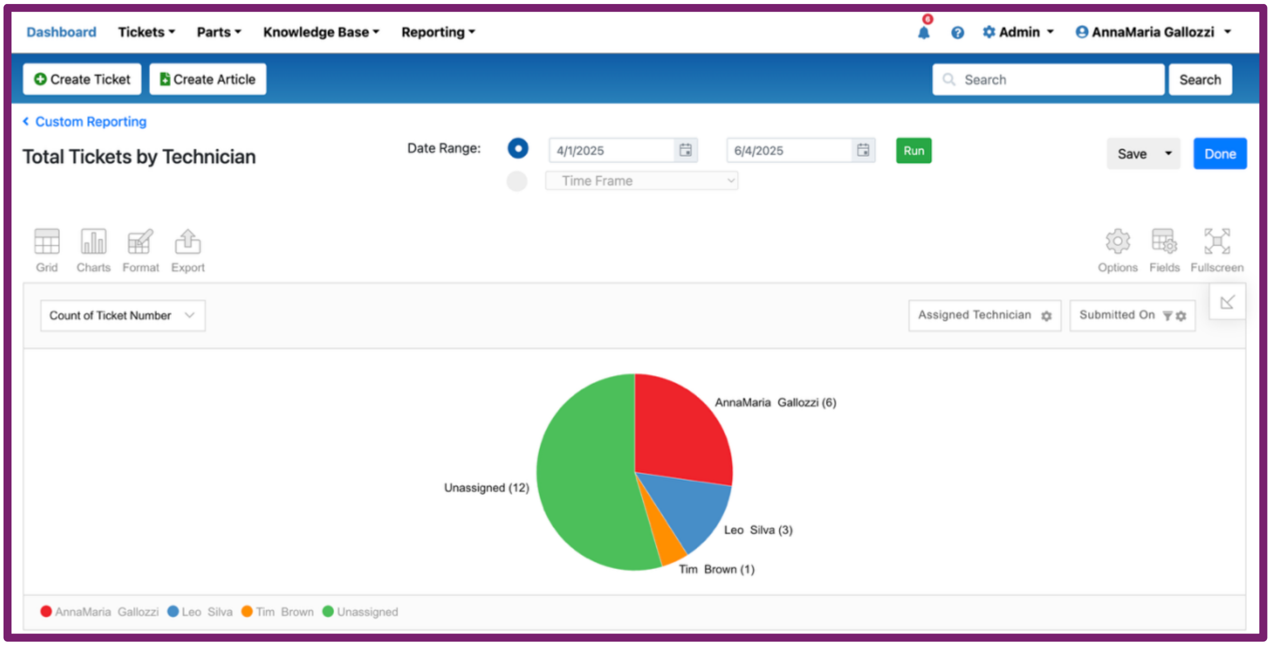
c. Charts (top left of report preview) - Click the **Charts** button to switch from grid view to visual charts. Available chart types include:

- Column
- Bar
- Line
- Scatter
- Pie
- Stacked Column
- Column Line
- Multiple Values

Tip: Use the **"Multiple Values"** checkbox to chart more than one metric at a time.

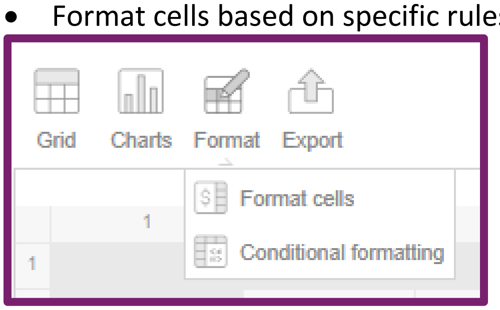


Below is an example of the Bar chart option, showing how dynamic a report can be.

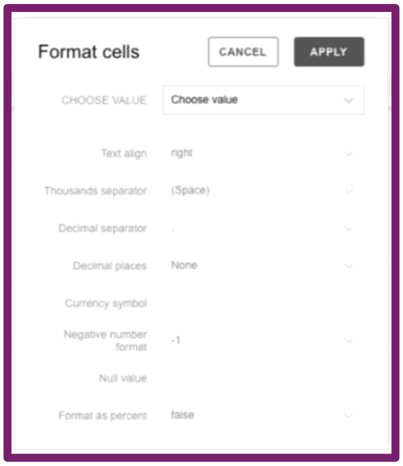


d. Format (top left of report preview) - Click **Format** to open cell-level and conditional formatting options. This allows you to:

- Set text alignment, decimal formatting, and currency symbols
- Choose how null, negative, or percentage values appear
- Format cells based on specific rules or thresholds

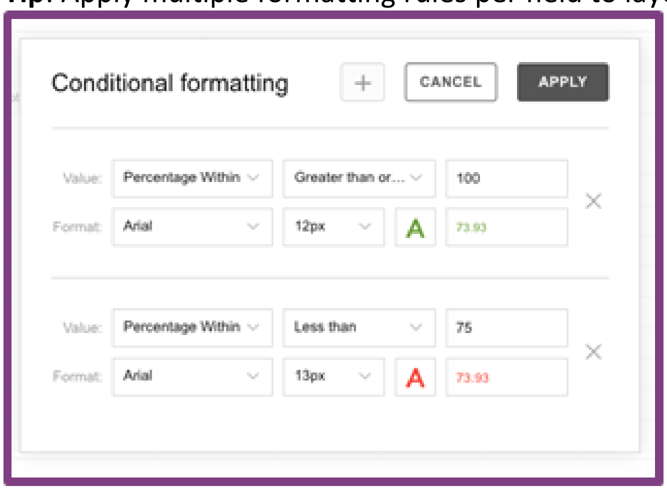


1. **Format Cells -** Customize how data is displayed:
   - Align text left, right, or center
   - Set number of decimal places
   - Add thousands/decimal separators
   - Apply currency or percent formatting

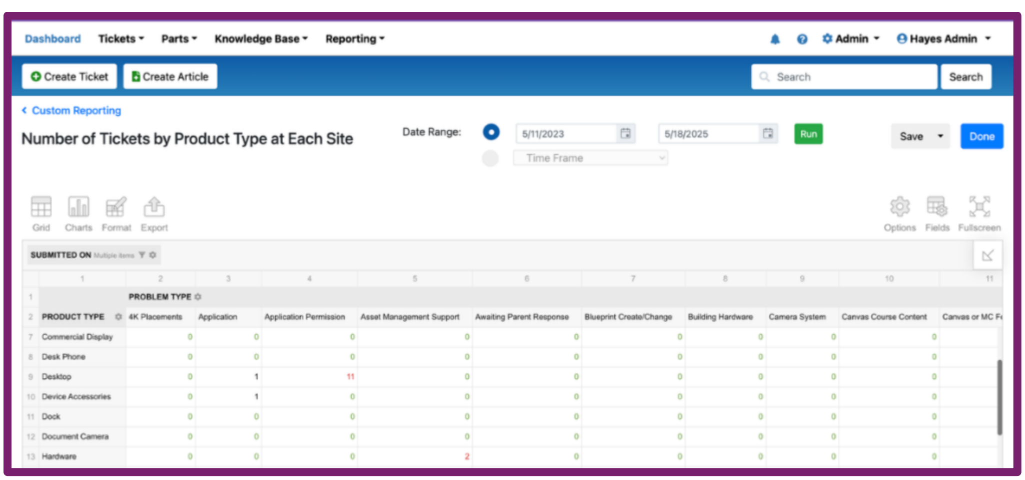


2. **Conditional Formatting** – Use conditional formatting to highlight cells that meet specific criteria—such as coloring high or low values or emphasizing performance thresholds.

   Tip: Apply multiple formatting rules per field to layer visual insights.



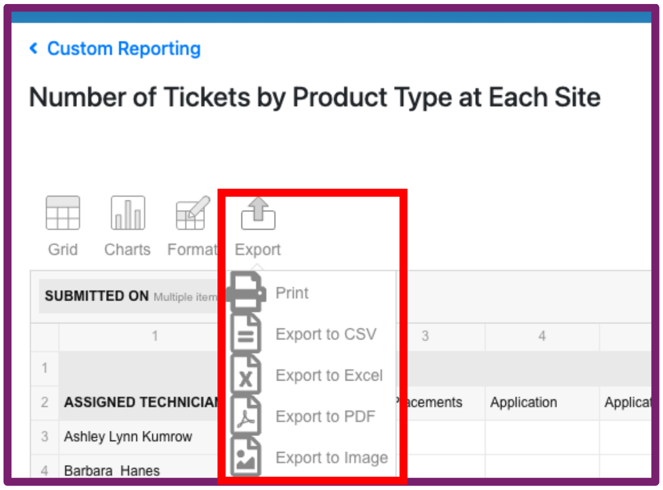
Below is an example of conditional formatting applied to the report preview where values above 100 are green and bold, while values below 75 are red and italicized.



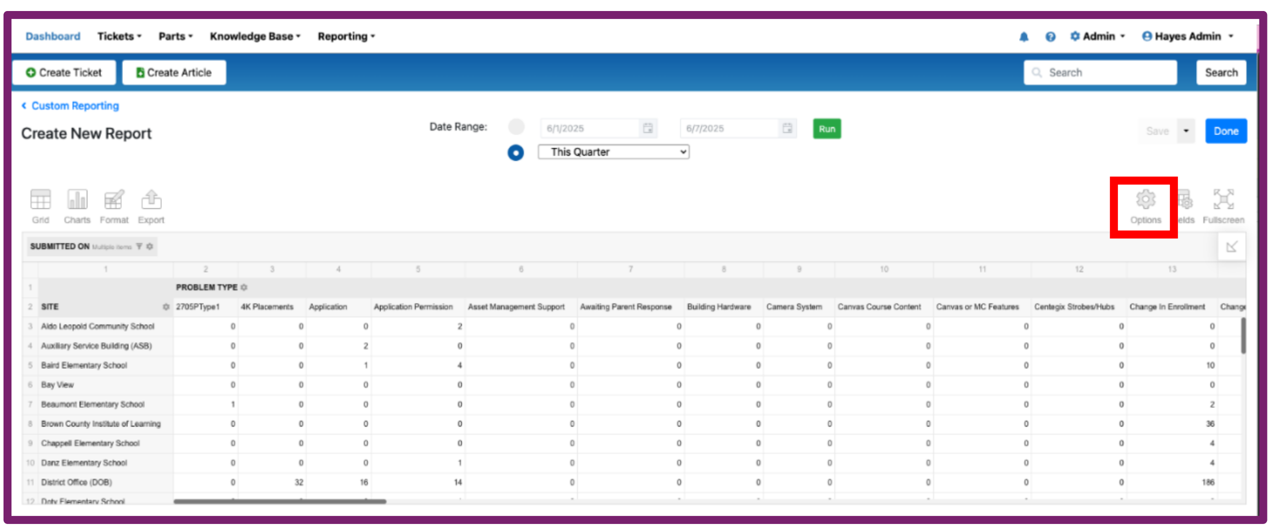
e. **Export** (top left of report preview) - Download your report in various formats to share or archive your data.

Export options include:

- Print
- Export to CSV
- Export to Excel
- Export to PDF
- Export to Image



f. Options (gear icon, top right of report preview) - Customize how data appears in the grid layout with controls for grand totals, subtotals, and layout style.



GRAND TOTALS:

- Do Not Show Grand Totals - hides the grand totals for the entire dataset.
- Show Grand Totals – shows totals for both rows and columns. (default)
- Show for Rows Only - shows totals for rows, not columns.

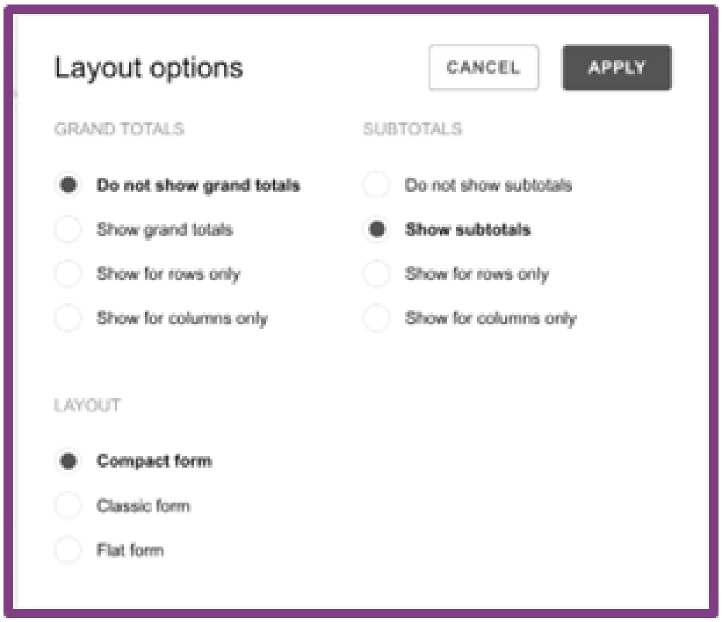
- Show for Columns Only - shows totals for columns, not rows.

LAYOUT:

- Compact Form - space-efficient layout, data is nested. (default)
- Classic Form - tabular layout for easer comparison.
- Flat Form - ungrouped layout for raw data review.

SUBTOTALS:

- Do Not Show Subtotals - removes all subtotals.
- Show Subtotals - displays subtotals for grouped data. (default)
- Show for Rows Only - subtotals only for grouped rows.
- Show for Columns Only - subtotals only for grouped columns.



- Click **Cancel** to exit back to the **Report Preview** page to review results**.**
- Use the **Apply** button to preview results**.** No changes are committed until you click **Save** or **Save As**.

g. **Fullscreen** (top right of report preview) – expands the report preview to the full height and width of the screen. Click Esc on your keyboard to exit or Click Minimize (which replaces the Fullscreen icon when in Fullscreen mode).

I. Saving a Report

Once you've configured your custom report, now you can **save your work** before exiting the report builder. Here's how saving works and what to keep in mind. There is no limit to the number of saved reports per user at this time.

Note: Unsaved Reports display the default name: Create New Report.

Saving a Report for the First Time

A. Clicking **Save** for the first time acts as a **Save As** function.
B. You'll be prompted to **enter a name** for your report.
   Note: Report names **cannot be edited** after saving. Reports **cannot be deleted** after saving.
C. Once named and saved, your report will appear in the **Saved Reports Grid** for future access.

Important Notes:

- **Report Names Are Permanent**
  Once a report is saved, the name **cannot be changed**. To rename a report, open it, make any changes, and click **"Save As"** to save it under a new name. This is being considered as a future enhancement.
- **No Deletion or Archiving**
  At this time, saved reports **cannot be deleted or archived**. This is a known limitation and is under review for a future enhancement.
- **Editing a Saved Report**
  Once a report is saved, you can edit the fields and save the report with new fields and configurations. It will be saved under the same name if you click "**Save"**. If you choose "**Save As**", it will save as a new report. If you click "**Done**" before saving, all edits will be lost.
- **Naming Restrictions**
  Avoid using characters that conflict with system or browser safety standards. The following **special characters are not allowed** in report names:
  - **Disallowed Characters:** < > / \ & % # { } [ ] | ^ ~ ` " ' ; : ? * +
    If your report name contains any of these, the system will prompt you to remove them before saving.

Using "Save As" After Saving

- Once a report has been saved, clicking **Save As** creates a **new copy** of the report under a different name.
- This is useful when making small adjustments to an existing report without overwriting the original.

Tip: Use clear, descriptive names that reflect the report's purpose, key filters, or date ranges (e.g., "Open Tickets – Q2 – High Priority").

Reminder: Always click **Save** before selecting **Done**. Clicking **Done** without saving will exit the report builder and **discard all unsaved changes**.

J. Best Practices and Tips

- **Use Clear Report Names**: When saving reports, use a naming convention that reflects the purpose or key filters. This makes the report easier to find later.

- **Limit Field Count Thoughtfully**: Prioritize essential fields to stay within the 15-field limit by prioritizing only essential fields. This helps maintain performance and improves overall usability.
- **Update Timeframes as Needed**: While the default range is the past 7 days, updating the date range to align with your needs will ensure the data is relevant.
- **Leverage Familiarity**: The report builder is designed to resemble other commonly used views (like the **All Tickets** grid). This reduces learning curves and speeds up onboarding.
- **Check Permissions**: Ensure that users assigned to build or edit reports have the appropriate role permissions. Saving and editing reports may be restricted based on user access.

K. Example Reports

The following examples demonstrate how to configure reports using common field combinations for real-world Help Desk scenarios. Each setup includes a clear purpose and recommended structure to help you analyze trends, monitor workloads, and make data-driven decisions.

Report Title: Summary of All Open and Recently Resolved High Priority Tickets Submitted by Technicians in the Past 30 Days by Site and Problem Type with Time Tracked Totals

Purpose: Monitor urgent, technician-submitted issues that are still open or were recently resolved. Use this report to assess workload and identify trends by location and issue type, with effort estimated via total time tracked.

Suggested Report Setup:

- **Rows:** Site, Problem Type
- **Columns:** Status (Open, Resolved), Submitted By
- **Filters:** Priority = High or Critical, Submitted On = Last 30 days, Submitted By = Technicians only (if roles are distinguishable)
- **Values:** Count(Ticket Number), Sum(Time Tracked)

Report Title: Device Failure Trends

Purpose: Identify recurring issues tied to specific manufacturers or product models. Inform purchasing, vendor negotiation, or warranty-related actions.

Suggested Report Setup:

- **Rows**: Manufacturer, Product Name, Model
- **Columns**: Problem Type
- **Values**: COUNT(Ticket Number), AVG(Time Tracked)
- **Filters**: Tag Status, Tag Site

Report Title: Location-Based Issue Analysis

Purpose: Identify sites or rooms with frequent issues or unreliable assets. Use this data to inform preventative maintenance or replacement strategies.

Suggested Report Setup:

- **Rows**: Site, Room, Product Name
- **Columns**: Problem Type
- **Values**: COUNT(Ticket Number)
- **Filters**: Tag Status = Active, Submitted On

Report Title: Technician Workload Distribution

Purpose: Evaluate technician performance and ticket load. Use this view to support reassignments or staffing decisions.

Suggested Report Setup:

- **Rows**: Assigned Technician
- **Columns**: Status, Priority
- **Values**: COUNT(Ticket Number), SUM(Time Tracked)
- **Filters**: Service Groups, Submitted On (last 30 days)

Report Title: Ticket Volume Over Time

Purpose: Visualize trends, spikes, and seasonal shifts in ticket volume. Helps with resource planning and staff training decisions.

Suggested Report Setup:

- **Rows**: Submitted On (group by week or month)
- **Columns**: Status or Source
- **Values**: COUNT(Ticket Number)
- **Filters**: Service Groups, Problem Type, Site

L. Fields Not Yet Available in Beta

Reminder: The following fields and areas are **not currently supported** in the Custom Reporting (Beta) release. These items will be evaluated for inclusion in future releases.

Excluded from Reporting:

- Dashboard data or visualizations
- Public Comments
- Private Notes
- Ticket History
- Attachments
- Time Tracked (Detailed Entries)- you are not able to report on individual time entries per technician.

- Parts Usage or Management
- "Site Type" field under device details

M. What's Coming Next

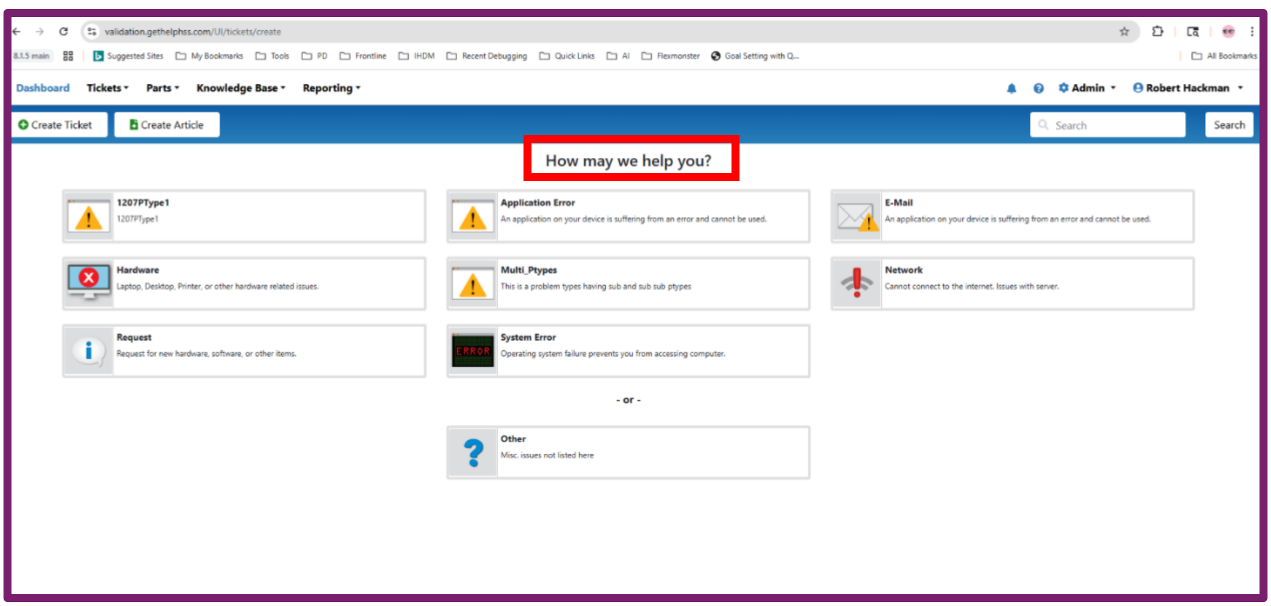
Custom Reporting (Beta) is part of a multi-phase rollout. The following enhancements are already being planned:

- Report Sharing
- Export to CSV/PDF
- Asynchronous Report Generation
- Scheduled Report Delivery via Email

These features will expand the usability and flexibility of the reporting tool, enabling wider adoption across teams and districts.

Improved Prompt Language - "How may we help you?"

On the ticket submission screen, the prompt previously labeled **"What seems to be the problem?"** has been updated to **"How may we help you?"**



This change appears on the **Problem Types** page in both the **User Portal** and the **Service Desk**.

This simple wording update creates a more welcoming tone and reflects a service-first mindset, helping users feel supported from the very first click.

Support and Training Resources

To support successful adoption of Custom Reporting, the following materials will be made available through your Frontline administrator or district training channels:

- Video walkthroughs
- Sample report templates

As this beta evolves, we welcome your feedback. For any issues or questions about the new feature, please contact your system administrator or submit a ticket via Frontline Help Desk Support.