PHASE 9: Reporting, Dashboards & Security Review

1. Reports

Reports were created to analyze ticket data and measure the effectiveness of customer support operations.

Key Reports Implemented:

a) Open Customer Tickets Report

- Displays all active tickets with details such as:

    o Customer Name

    o Ticket Number

    o Status

    o Priority

    o Assigned Agent

    o Created Date

- Helps support teams track pending, new, and unresolved tickets in real time.

b) Agent Performance Report

- Groups tickets by **Assigned Agent**.

- Shows the total number of tickets handled by each agent.

- Helps evaluate workload distribution and agent productivity.

Purpose of Reports:

- Track ticket volume and status distribution.

- Monitor agent performance.

- Identify delays, recurring issues, and high-priority cases.

- Support data-driven decision-making for support management.

2. Dashboards

Dashboards were created to provide a **visual summary of support operations** using key reports.
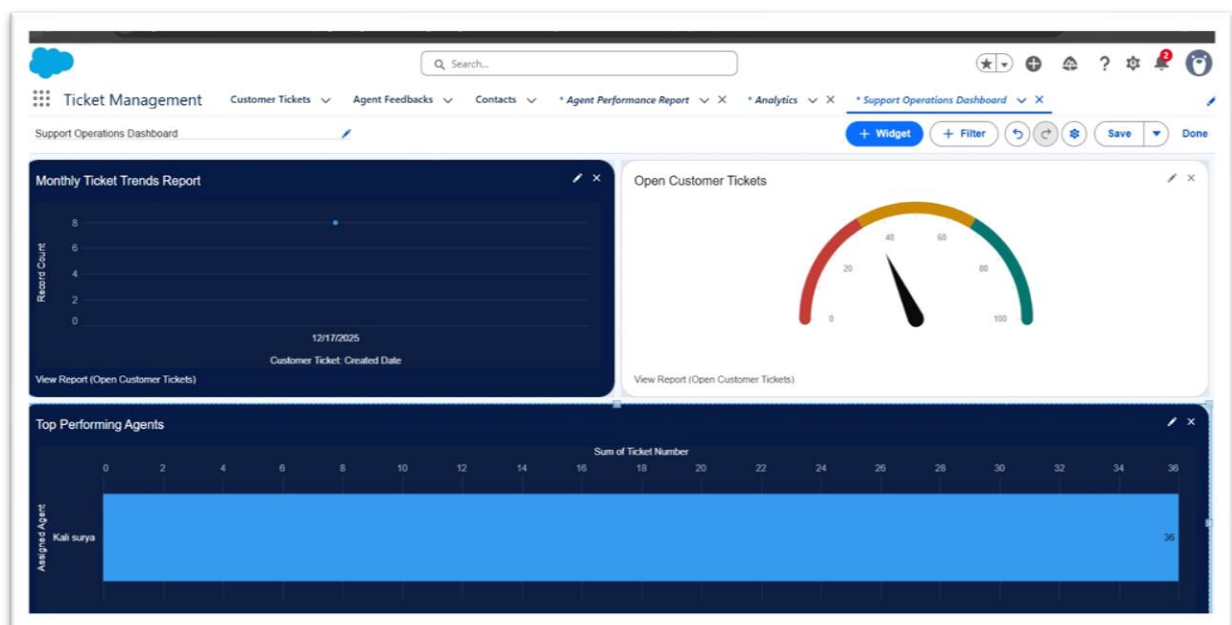
Support Operations Dashboard

(Based on the dashboard image)

Dashboard Components Used:

- **Monthly Ticket Trends Chart**

  - Displays the number of tickets created over time.

  - Helps identify spikes or drops in customer issues.

- **Open Customer Tickets Gauge**

  - Shows the current count of open tickets.

  - Uses color indicators to represent workload levels.

- **Top Performing Agents Bar Chart**

  - Highlights agents handling the highest number of tickets.

  - Useful for recognizing performance and balancing workloads.

Dashboard Benefits:

- Provides a quick snapshot of overall support performance.

- Makes complex report data easy to understand visually.

- Helps managers identify trends, workload issues, and performance gaps.

- Enables faster and more informed decision-making.

3. Security Review

A security review was conducted to ensure proper access control and data protection.

Key Security Measures:

- Role-based access using Profiles and Role Hierarchy.

- Ticket object sharing set to **Private** to restrict unauthorized access.

- Managers can view subordinate agents' tickets through role hierarchy.

Security Objectives:

- Ensure only authorized users can view or update sensitive ticket data.

- Protect customer information and maintain data confidentiality.

- Prevent accidental edits, data leaks, or unauthorized access.

- Align with organizational and compliance standards.

Benefits of Phase 9 Implementation

- Clear visibility into ticket status and agent performance

- Improved monitoring of support operations

- Faster identification of issues and trends

- Secure handling of customer and ticket data

- Management-friendly analytics through dashboards