

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:
 - Customer Name
 - Ticket Number
 - Status
 - Priority
 - Assigned Agent
 - 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.

The screenshot shows a software interface titled 'Ticket Management'. At the top, there are navigation tabs: 'Customer Tickets', 'Agent Feedbacks', 'Contacts', 'Open Customer Tickets', and 'Analytics'. Below the tabs, a search bar and various filter and charting options are visible. The main area displays a table titled 'Report: Customer Tickets' with the sub-section 'Open Customer Tickets'. The table has columns for 'Customer Ticket: Created Date', 'Customer Ticket: Cust Name', 'Ticket Number', 'Customer Ticket: ID', 'Status', 'Priority', 'Assigned Agent', 'Resolved Date', 'Submitted by', and 'Title'. A total of 36 records are shown, with a breakdown by date: 12/17/2025 (8), 12/18/2025 (1), 12/19/2025 (1), 12/20/2025 (1), 12/21/2025 (1), 12/22/2025 (1), 12/23/2025 (1), 12/24/2025 (1), 12/25/2025 (1), 12/26/2025 (1), 12/27/2025 (1), 12/28/2025 (1), 12/29/2025 (1), 12/30/2025 (1), 12/31/2025 (1). The table includes several sample rows with notes in the 'Title' column, such as 'A ticket Created', 'A ticket Updated', 'A ticket Updated Again', 'A ticket run again', 'A ticket Created again and again', 'A ticket wasted', 'A ticket created with time', and 'A ticket Sample'. At the bottom of the table, there are buttons for 'Row Counts', 'Detail Rows', 'Subtotal', and 'Grand Total'.

Customer Ticket: Created Date	Customer Ticket: Cust Name	Ticket Number	Customer Ticket: ID	Status	Priority	Assigned Agent	Resolved Date	Submitted by	Title
12/17/2025 (8)	Tenny	1	a00900000m2Rd8	Pending	High	Kali surya	-	-	A ticket Created
	Siva	2	a00900000m2W8c	Resolved	Critical	Kali surya	-	-	A ticket Updated
	Riseer	3	a00900000m2z6t8	Closed	High	Kali surya	-	-	A ticket Updated Again
	Viral	4	a00900000m1pw2	Resolved	Low	Kali surya	-	-	A ticket run again
	Nagesh	5	a00900000m2LHL	Pending	High	Kali surya	-	-	A ticket Created again and again
	Pradeep	6	a00900000m2uk1	Closed	High	Kali surya	-	-	A ticket wasted
	Mohan	7	a00900000m2GKz	New	Critical	Kali surya	-	-	A ticket created with time
	Kali	8	a00900000m31X0	Pending	Critical	Kali surya	-	-	A ticket Sample
Subtotal		36							
Total (8)		36							

2. Dashboards

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

Support Operations Dashboard

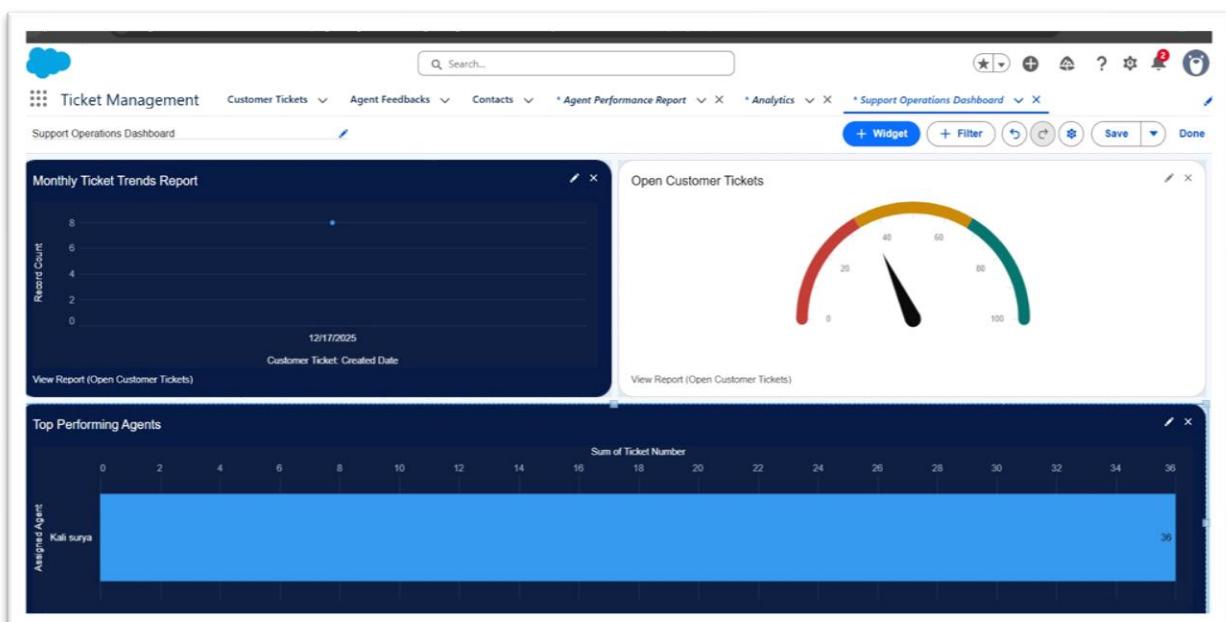
(Based on the dashboard image)

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