



PUBLICSTUFF
an Accela company

ADVANCED REPORTING

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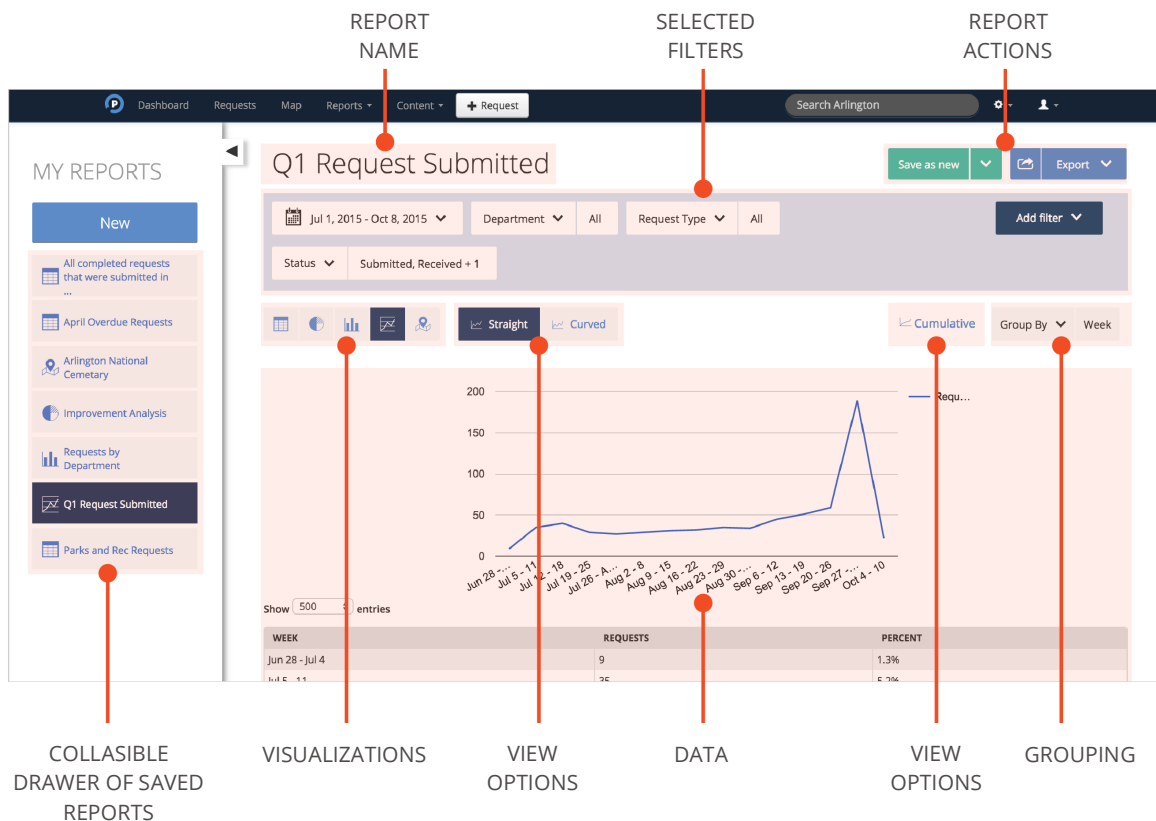
1. ADVANCED REPORTING OVERVIEW

With Advanced Reporting, you can view a real-time snapshot of your agency's most important metrics, and define your priorities. Analyze request trends and departmental performance through saved, shared, or exported reports. This fully customizable interface allows for easy data visualization.

ACCESSING ADVANCED REPORTING

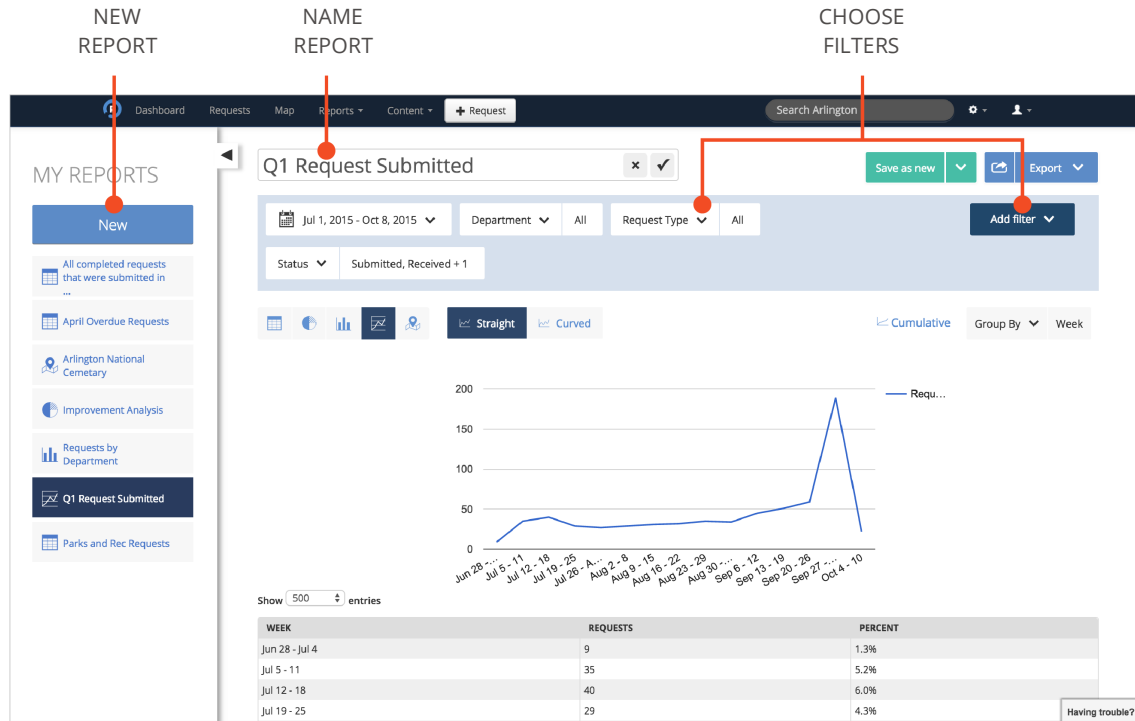
Navigate to the **Reports** tab and click **Advanced**.

INTERFACE



2. CREATING A REPORT

To create a new report, click New in the left hand drawer, name the report, and choose specific filters to customize your report.



The screenshot illustrates the process of creating a report in the PUBLICSTUFF system. Three red arrows point to key actions:

- NEW REPORT:** Points to the 'New' button in the 'MY REPORTS' sidebar.
- NAME REPORT:** Points to the text input field containing 'Q1 Request Submitted'.
- CHOOSE FILTERS:** Points to the filter selection area, including date ranges, Department, Request Type, and Status.

The main report view displays a line chart and a data table for 'Q1 Request Submitted'.

WEEK	REQUESTS	PERCENT
Jun 28 - Jul 4	9	1.3%
Jul 5 - 11	35	5.2%
Jul 12 - 18	40	6.0%
Jul 19 - 25	29	4.3%

3. FILTERING FILTERS

Filters allow you to narrow your searchable data to ensure that you are viewing the most appropriate data. Default filters include: **date**, **department**, **request type**, and **status**.

Other Default Filters include:

- **Address:** Searches the location field
- **Attachment:** Searches for requests that have or do not have attachments
- **Comment Contains:** Searches the content of comments
- **Commented On:** Searches for requests that have or do not have comments
- **Completed By:** Searches for requests closed by the specified user.
- **Created By:** Searches for requests created by the specified user
- **Current Assignee:** Searches for requests currently assigned to the specified user or department
- **Date Range:** Searches for requests that were submitted within the specified date range
- **Department:** Searches for requests currently assigned to the specified department
- **Duplicate Requests:** Filters in or out requests that have been marked as duplicate.
- **Followed By:** Filters requests followed by specified staff users
- **Geography:** Filters requests by geographic boundary
- **Initial Assignee:** Searches for requests based on the user assigned to its first workflow step
- **Due Date:** Filters requests by their due state. Requests are considered near due two days before their due date.
- **Priority:** Filters based on the priority field.
- **Privacy:** Filters requests based on their privacy setting. Include only or exclude private requests.
- **Resident Contact Info:** Search resident contact info fields for phone, email, and name matches
- **Satisfaction:** Filter requests based on service rating residents submitted.
- **Status:** Filter requests based on current status.
- **Workflow Contributor:** Searches for requests that were ever assigned to the specified user.

ADDING FILTERS

To add filters, select options from the Add filter dropdown. In order to create a report that best fits your requirements, you can choose default fields or custom fields.

SELECT FILTERS

Dashboard Requests Map Reports Content + Request Search Arlington

MY REPORTS

New

All completed requests that were submitted in the last 30 days

April Overdue Requests

Arlington National Cemetary

Satisfaction Improvement Analysis

Requests by Department

April Overdue Requests

Save as new Export

Apr 4, 2015 - May 4, 2015 Department All Request Type All

Add filter

Default Fields Custom Fields

- Date Range
- Department
- Geography
- Keyword
- Overdue
- Priority
- Privacy
- Request Category

Show 10 entries

ID	REQUEST TYPE	DESCRIPTION	ADDRESS	ASSIGNED TO
		The customer trash was missed. He had his carts out		

SELECT ADDITIONAL FILTERS

Dashboard Requests Map Reports Content + Request Search Arlington

MY REPORTS

New

All completed requests that were submitted in the last 30 days

April Overdue Requests

Arlington National Cemetary

Improvement Analysis

Requests by Department

Q1 Request Submitted

Water Bureau Requests

Q1 Request Submitted

Save as new Export

Jan 1, 2015 - Mar 31, 2015 Department All Request Type All

Add filter

Status All Request Category Park Maintenance

Missing

Park Maintenance

Residential Recycling

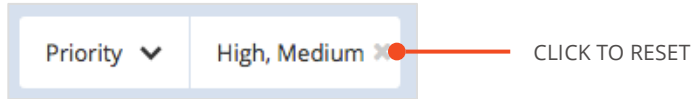
Residential Trash

Show 10 entries

ID	REQUEST TYPE	DESCRIPTION	ADDRESS	ASSIGNED TO	PRIORITY	STATUS	CREATED DATE	DUE DATE
785979	Dog Park Maintenance	Dogs running on park grounds unleashed everyday.	1601-1639 South Ives Street, Arlington, VA 22202, USA	Arlington PNR 311	None	Completed	March 27, 2015 8:52 pm	April 17, 2015
784542	Facilities Damaged	One of the slides on the playground had been closed off with wood paneling. Today the wood paneling is hanging open with large nails exposed. It is dangerous and should be fixed immediately. Thank you!	No Address Given, Arlington, VA, 22201	Arlington PNR 311	None	In progress	March 26, 2015 3:50 pm	April 15, 2015
784487	Facilities	The entire middle net holding has been ripped out of the court and thus there is a large hole and the	Walter Reed Community Center and Park, 2909 16th Street South,	Arlington	None	In	March 26, 2015	Having trouble?

RESETTING FILTERS

Hover over the filter and click the **X** to remove the filter.



REMOVING FILTERS

Click the **Filter** button and uncheck the **Field name** to remove a specific Filter.

4. REPORT VISUALIZATIONS

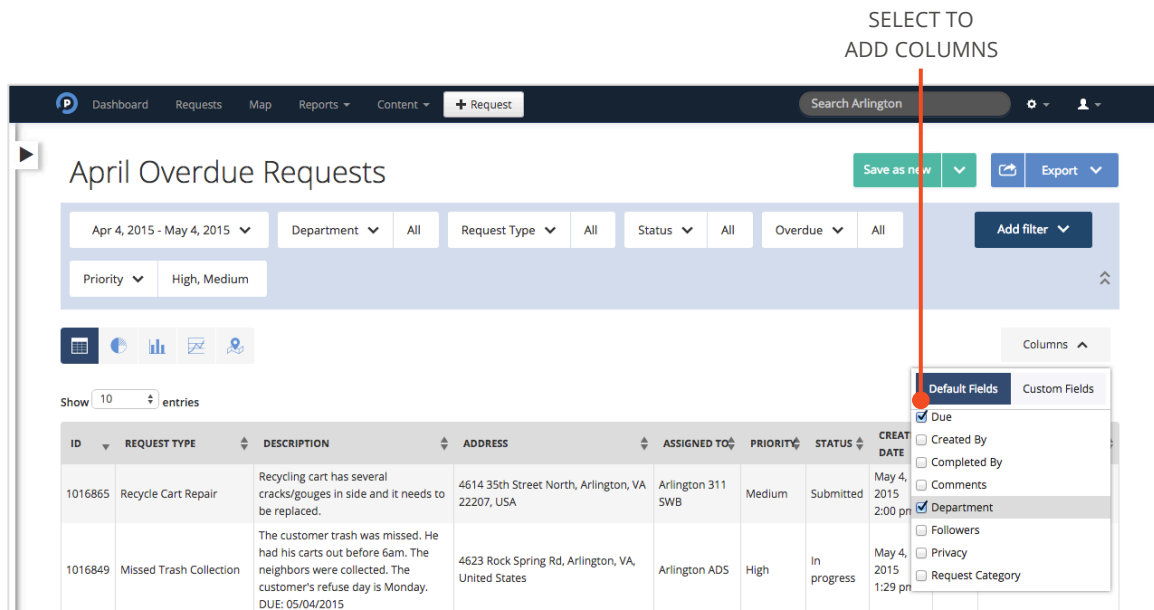
With Advanced Reporting, you can produce an unlimited number of reports and views.

Specific visualization options include:

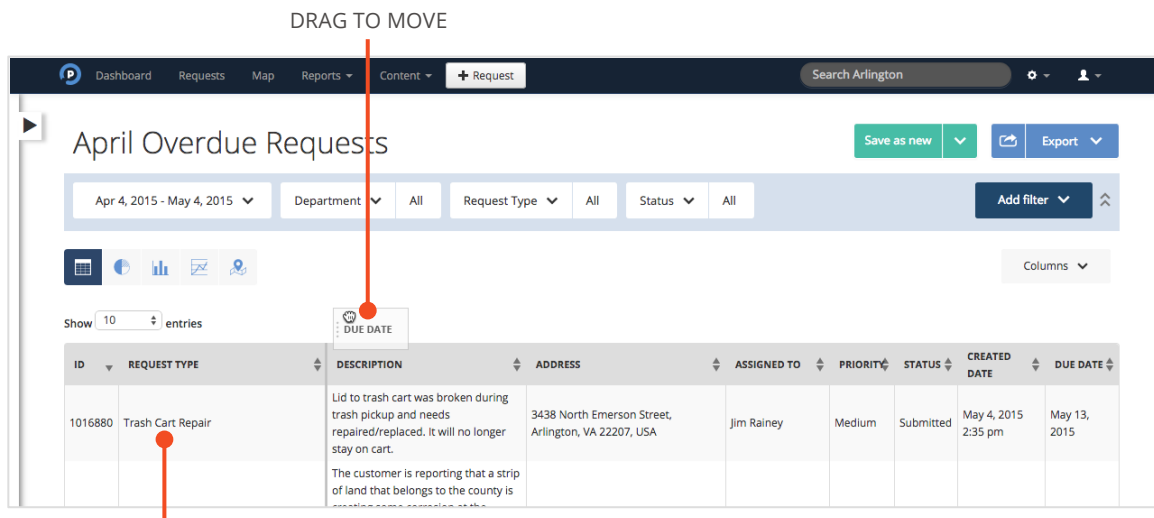
- Table View
- Pie Chart
- Bar Chart
- Line Graph
- Map View
 - Heat Map
 - Density Map

TABLE VIEW

The table format displays detailed information on one page. The Columns dropdown allows you to pick the fields you want displayed in your table. One can configure these as custom fields and default fields.



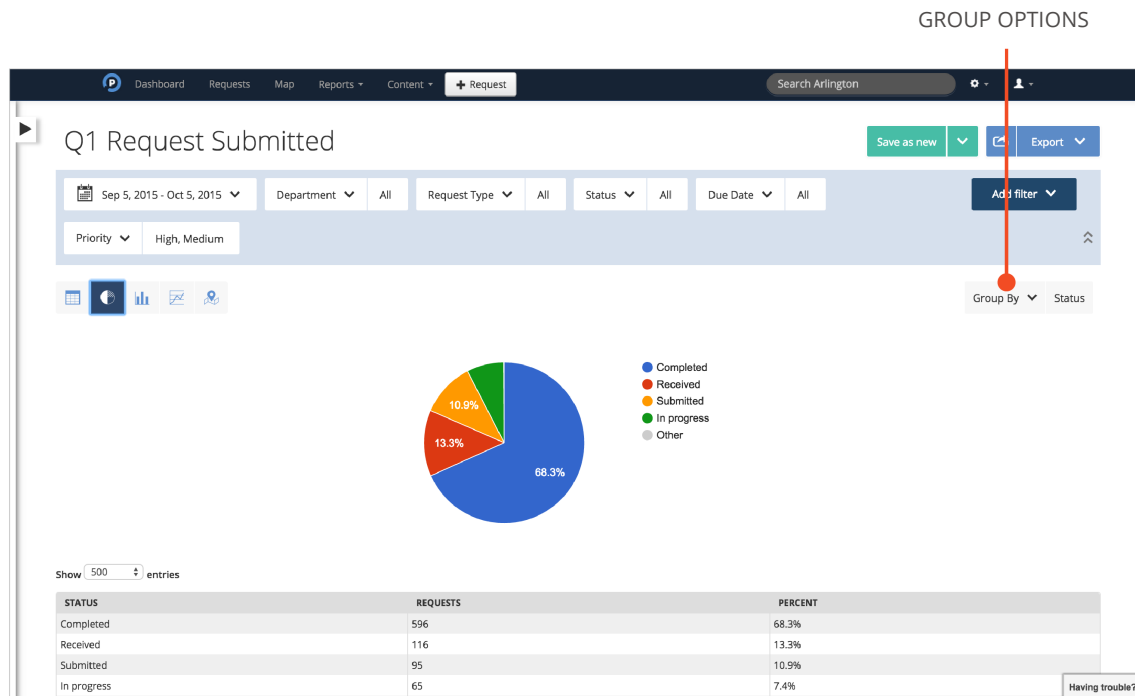
Drag and drop the column title to rearrange the order of columns and customize the table even further. When you click on a specific request, within either the ID column or Request Type column that will take you that Request's details view allowing you to get more information and manage the request.



CLICK TO GO TO DETAILS PAGE

PIE CHART

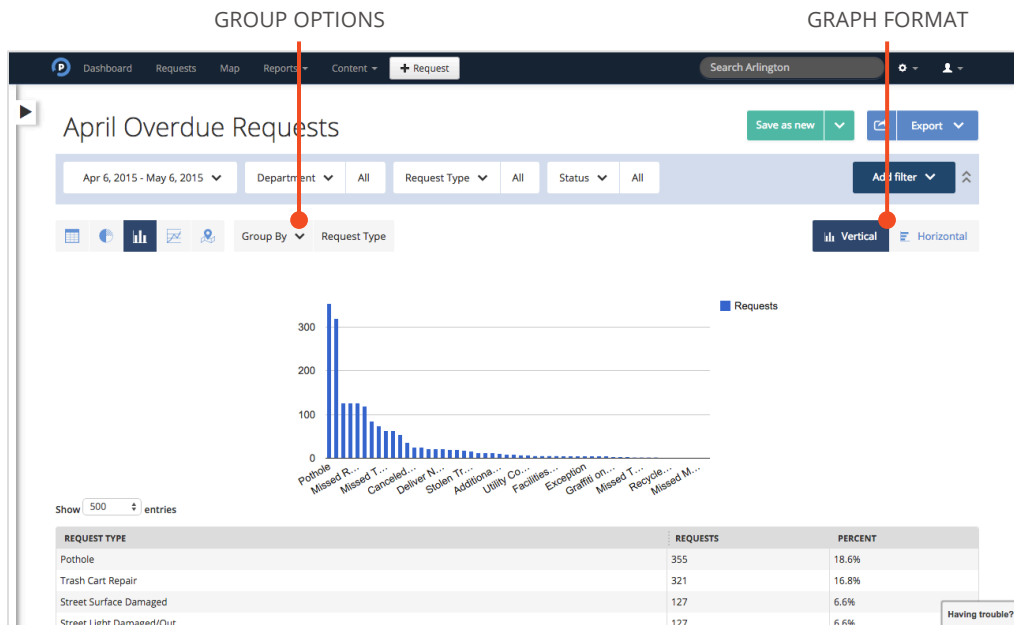
A pie chart report will enable you to make comparisons between data. Pie charts effectively show groups of data in proportion to the whole data set. To choose how you would like the information grouped, click the **Group By** dropdown. When there are many groups, a bar chart is often preferable.



BAR CHART

A bar chart will enable you to make comparisons between data. Bar charts are more effective than pie charts when the data set has many groupings.

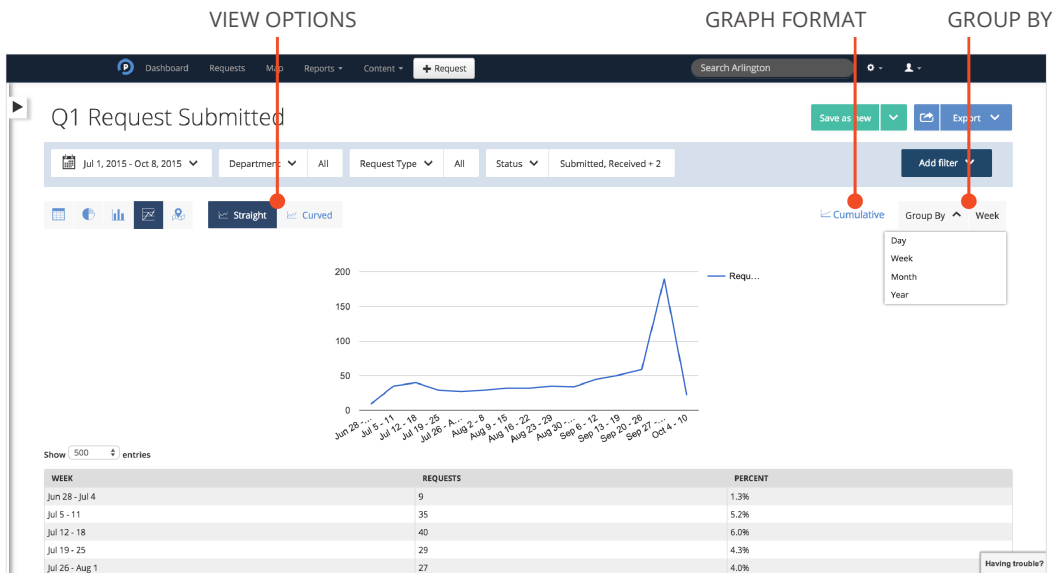
To choose how you would like the information grouped, click the **Group By** dropdown. You can also change the orientation of the graph to **Vertical** or **Horizontal**.



LINE GRAPH

A line chart will enable you to track trends and changes over time.

The data can be grouped by days, weeks, months, and years. You can toggle the graph from periodic to cumulative. A cumulative line chart allows you to see how service requests have added up over time.



ADDITIONAL INSIGHTS

Within the Pie, Bar, and Line charts, you can perform deeper analysis by clicking on a slice, column, or point, which will display the underlying data in an information window. From there, you can drill into specific requests to take action.



MAP VIEW

The map enables you to visualize requests plotted by their address on a map. The map can be used to identify problem areas, plan routes, and investigate trends in a specific area.

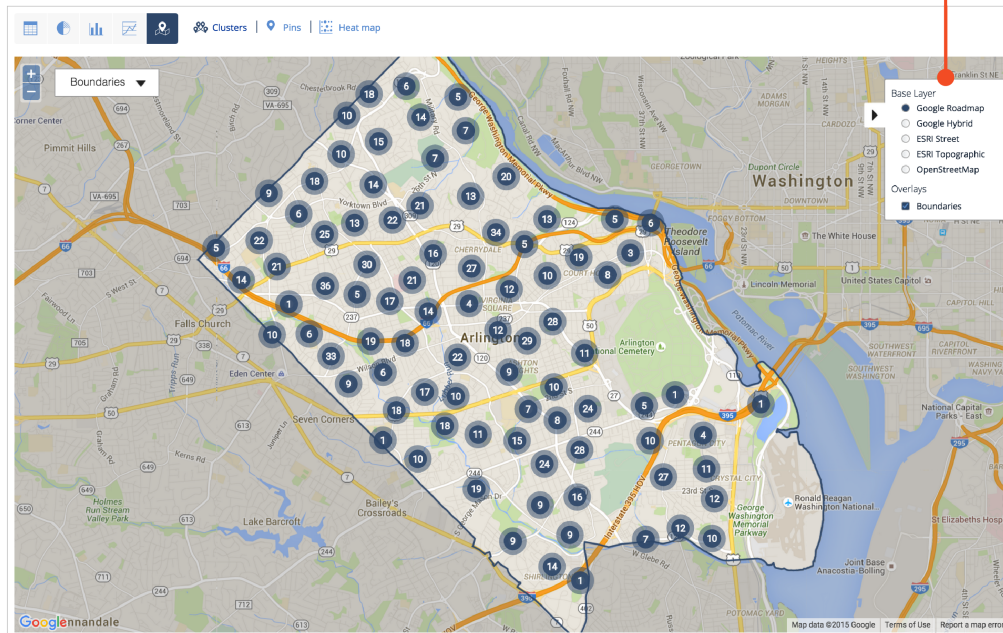
CLUSTER MAP

By default, requests are grouped into clusters. When analyzing a large data set, using the cluster view will allow you to quickly drill into the underlying and take action on requests.

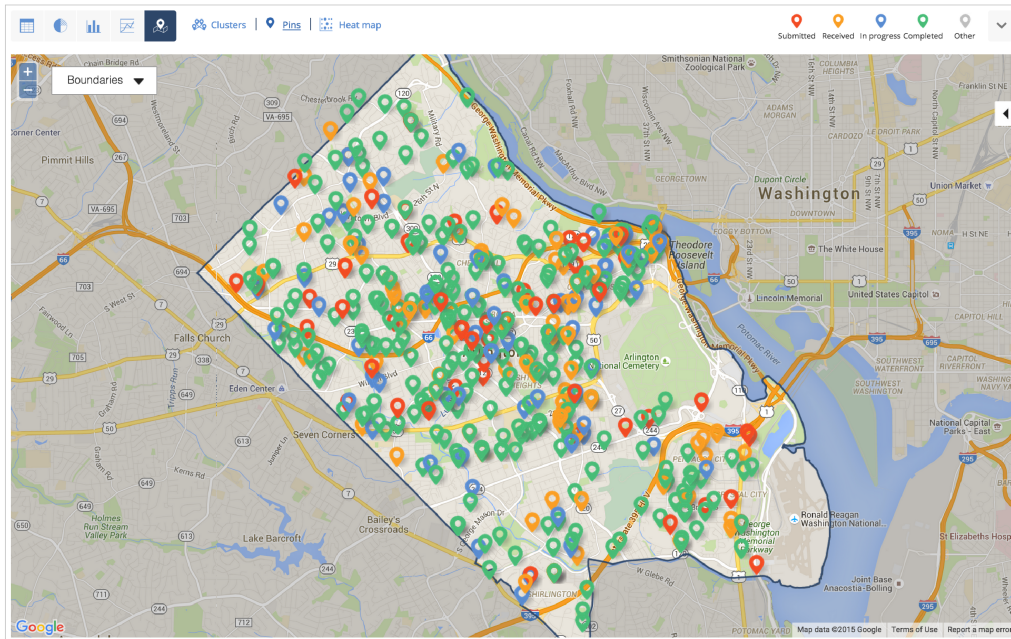
The data on the map can also be viewed as individual pins. This is typically recommended for smaller data sets, when you want to pin point the exact location of requests. The color of the pins is also configurable. Specifically, you can change their colors so that they group requests by status, priority, or due date.

Based on your preference, you can also change the map view to different base maps.

VIEW OPTIONS

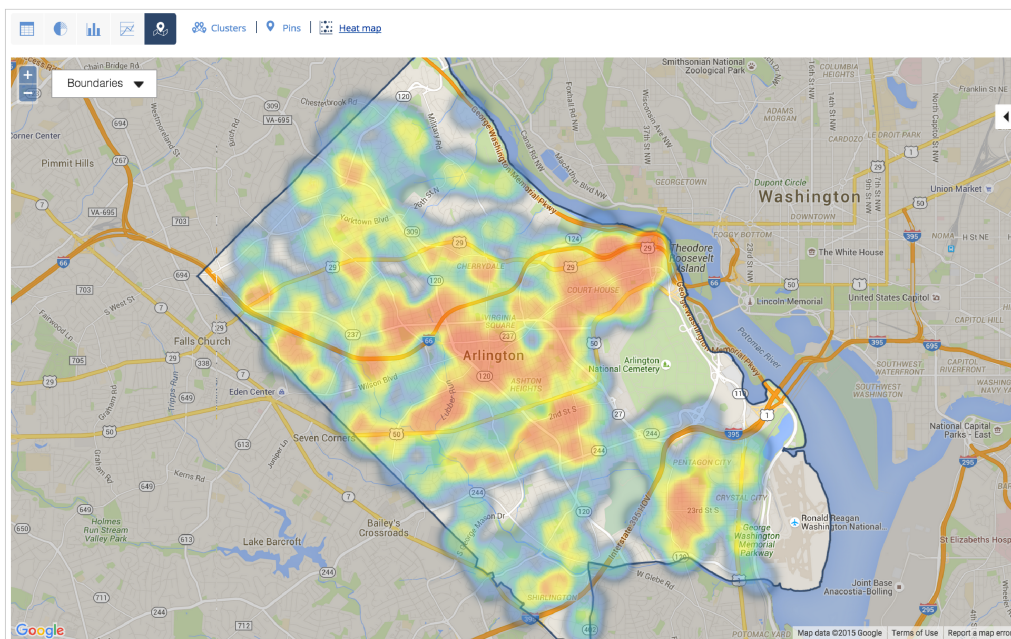


PIN MAP



HEAT MAP

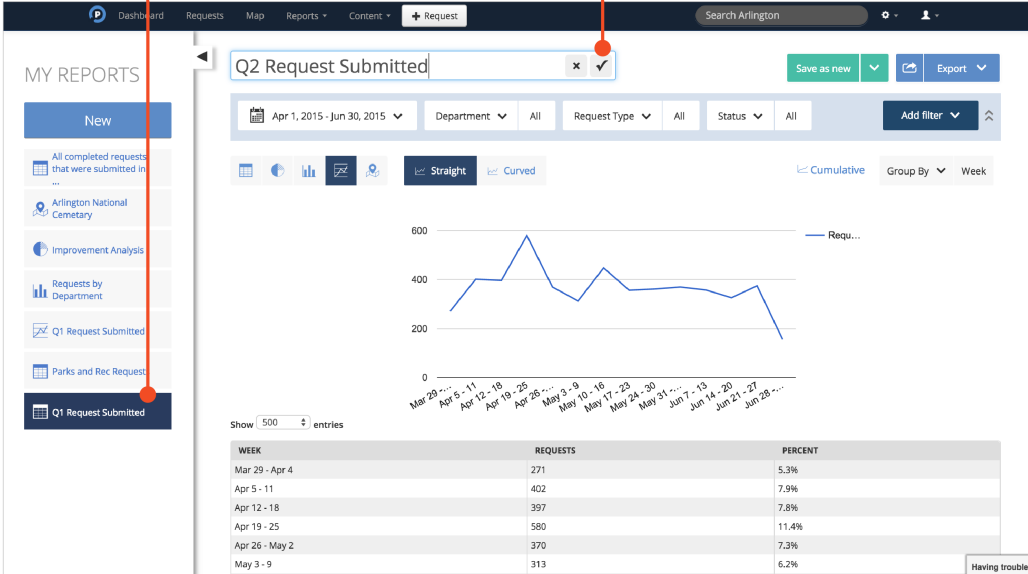
The heat map enables you to identify hot spots with a high concentration of submitted requests.



5. SAVING REPORTS

To save a brand new report, you should click **Save as New**. This will create a new entry in the left side panel. If you load a saved report and make changes, you should **Save as New** if you do not want to overwrite the original report. If you want to overwrite the original report, then you should instead click the dropdown and click **Save**.

NEW REPORT **SAVE NEW REPORT**



MY REPORTS

New

- All completed requests that were submitted in ...
- Arlington National Cemetery
- Improvement Analysis
- Requests by Department
- Q1 Request Submitted
- Parks and Rec Request
- Q1 Request Submitted**

Q2 Request Submitted

Apr 1, 2015 - Jun 30, 2015

Department All Request Type All Status All Add filter

Straight Curved Cumulative Group By Week

600
400
200
0

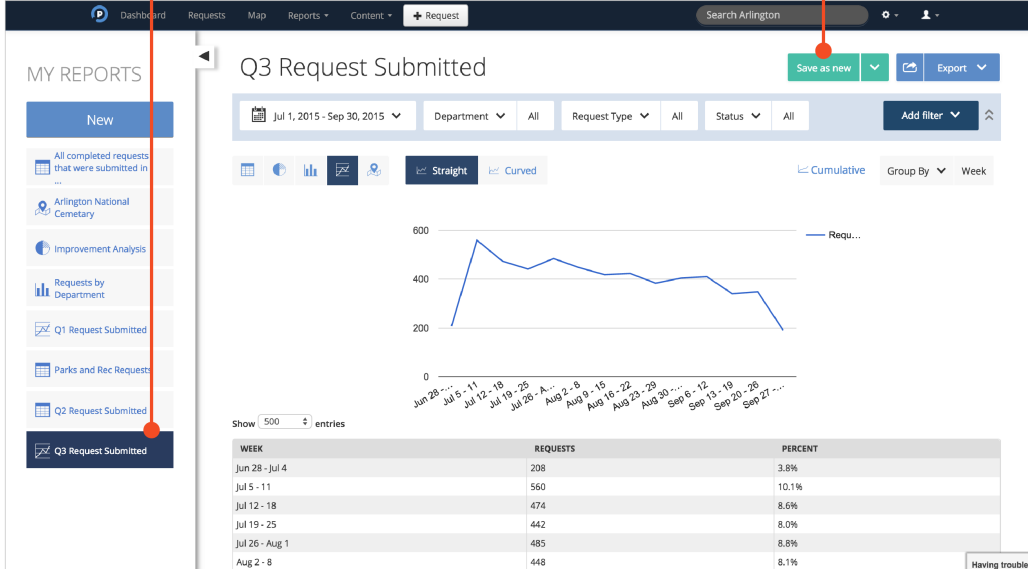
Mar 29 - Apr 4
Apr 5 - 11
Apr 12 - 18
Apr 19 - 25
Apr 26 - May 2
May 3 - 9
May 10 - 16
May 17 - 23
May 24 - 30
May 31 - Jun 6
Jun 7 - 13
Jun 14 - 20
Jun 21 - 27
Jun 28 - ...

Show 500 entries

WEEK	REQUESTS	PERCENT
Mar 29 - Apr 4	271	5.3%
Apr 5 - 11	402	7.9%
Apr 12 - 18	397	7.8%
Apr 19 - 25	580	11.4%
Apr 26 - May 2	370	7.3%
May 3 - 9	313	6.2%

Having trouble?

MODIFIED REPORT **SAVE AS NEW**



MY REPORTS

New

- All completed requests that were submitted in ...
- Arlington National Cemetery
- Improvement Analysis
- Requests by Department
- Q1 Request Submitted
- Parks and Rec Request
- Q2 Request Submitted
- Q3 Request Submitted**

Q3 Request Submitted

Jul 1, 2015 - Sep 30, 2015

Department All Request Type All Status All Add filter

Straight Curved Cumulative Group By Week

600
400
200
0

Jun 28 - Jul 4
Jul 5 - 11
Jul 12 - 18
Jul 19 - 25
Jul 26 - Aug 1
Aug 2 - 8
Aug 9 - 15
Aug 16 - 22
Aug 23 - 29
Aug 30 - Sep 5
Sep 6 - 12
Sep 13 - 19
Sep 20 - 26
Sep 27 - ...

Show 500 entries

WEEK	REQUESTS	PERCENT
Jun 28 - Jul 4	208	3.8%
Jul 5 - 11	560	10.1%
Jul 12 - 18	474	8.6%
Jul 19 - 25	442	8.0%
Jul 26 - Aug 1	485	8.8%
Aug 2 - 8	448	8.1%

Having trouble?

6. SHARING & EXPORTING REPORTS

You can save and share reports between PublicStuff Pro users. Sharing ensures that your team is working from the same list of requests, and is viewing the same reports. Reports are exported as XLS, CSV, or text format.

External sharing with non-PublicStuff Pro users is easy. You can simply export the file and email it directly to your external users.

