How to Create and Use Reports in MSPbots

MSPbots offers a reporting feature that enables you to generate reports for sharing with teammates and leaders of your organization. These reports facilitate data-driven decision-making and aid in monitoring your company or team's performance against key metrics. This page guides you in creating and configuring reports to deliver relevant information to specific individuals based on a predefined schedule.

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What are the benefits of using reports?

Leaders rely on reports to communicate important information to clients and their teams. The MSPbots app allows you to create and send reports that summarize historical data, metrics, and trends that can be used for decision-making, problem diagnosis, capacity planning, and performance improvement. You can share these reports externally with clients or internally with teams via a link or PDF format following a reporting schedule.

Relevant applications and permissions

You can set up dashboards for all MSPbots apps, BI packages, and applicable integrations. Only users with admin permissions can create dashboards and reports. If you don't have enough permissions, contact your administrator for help.
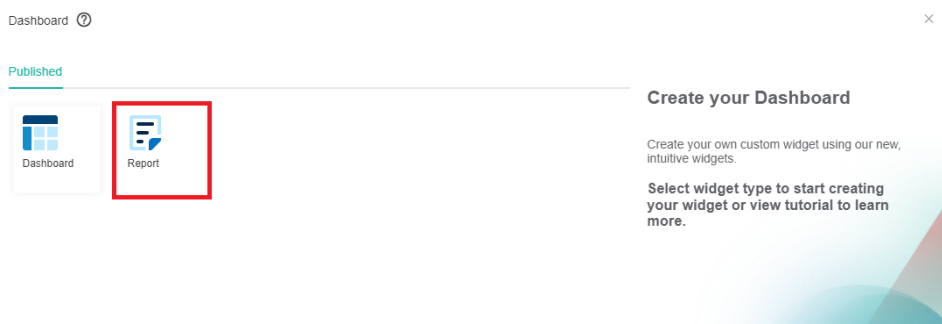
How to create a report

Do the following to set up your report:

1. Open the MSPbots app as administrator.
2. Navigate to **Dashboards** on the menu and click the **New Dashboard** button.
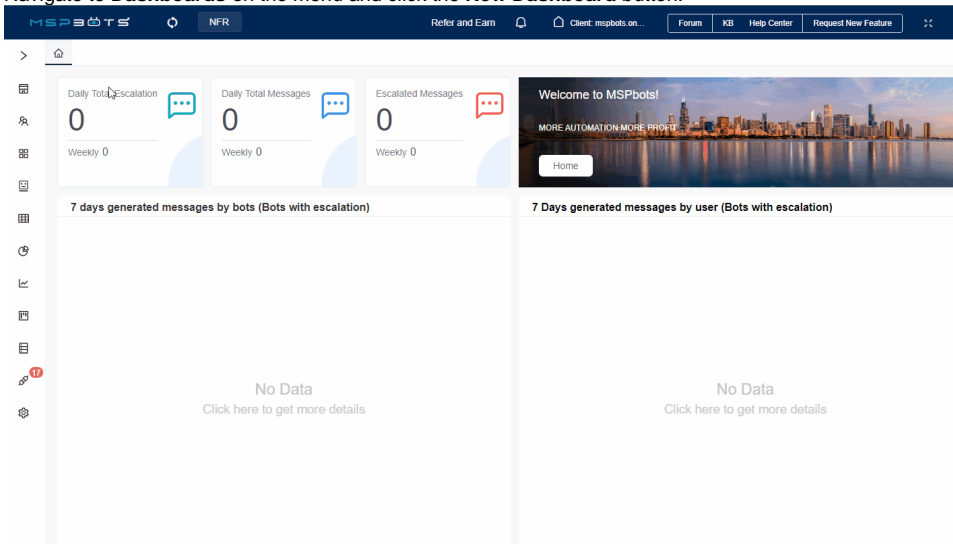
3. In the Dashboard window, select **Report**.

4. When the Add New Dashboard window opens, do the following:
    a. Enter your dashboard's name in the **Name** field.
    b. Click the **Role** dropdown menu and select the roles that will have access to the dashboard.
    c. Click the **Tag** dropdown menu and select one or multiple tags to label your new dashboard.
    d. Next, provide a **Description** for your dashboard.
    e. Click **Continue**. This opens the tab for your new dashboard.

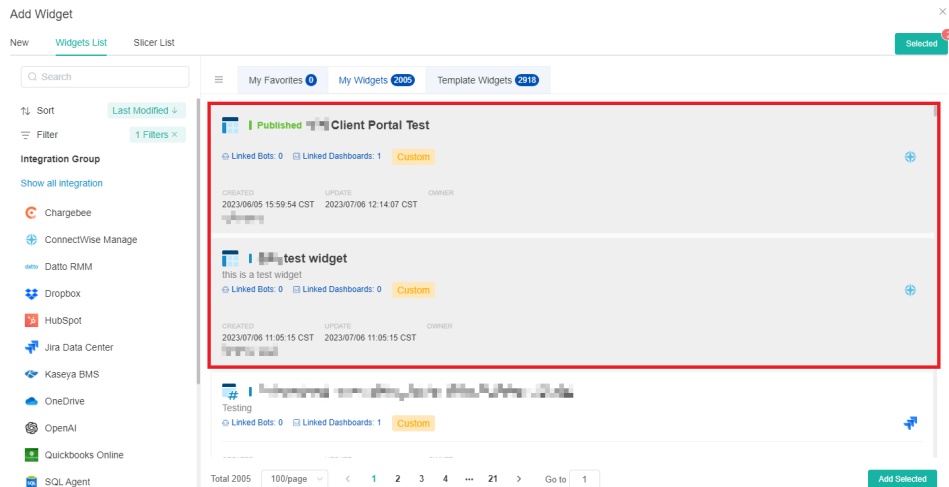5. When the tab for your new report opens, click **Add Widget**. This opens the Add Widget window.

6. Next, on the **Add Widget** window, click **Widgets List** and select the widgets to show in your report.


The assets in the image are for demonstration only.

You can also click **New** to create new widgets to add to your report or click **Slicer List** to add slicers.

7. Click the **Add Selected** button when you're done selecting widgets and slicers for your report. The widgets will appear in the new report.
8. Optional: If needed, modify your report's size and orientation. Click the **Size** dropdown menu to select **A4** or **letter**, and click the **Orientation** drop down menu to select **portrait** or **landscape**.
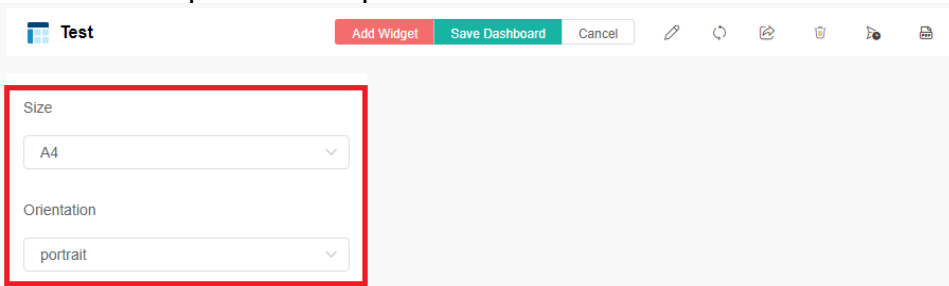
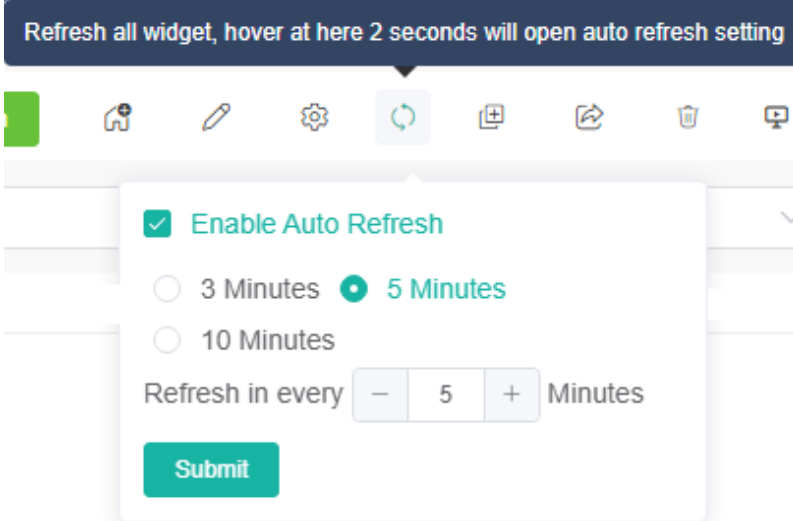9. Click **Save Dashboard** to save the settings.
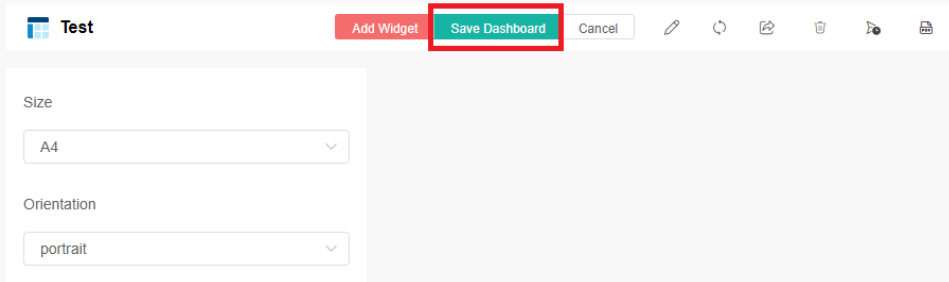
The new report will appear under **My Dashboards**.
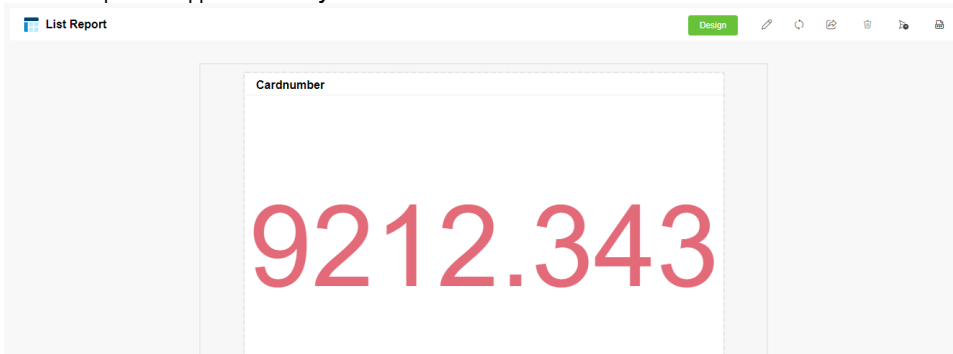
What other actions can I do on my report's page?

- **Adjust the settings** - Click the Design button to modify the widget settings and to adjust the report's size, and orientation.

- **Edit the report's basic information** when you click ✏️ .

- **Refresh the data on your report** - Click ↻ to refresh all widgets. Hovering over the refresh icon for two seconds will open the auto-refresh settings.

Refresh all widget, hover at here 2 seconds will open auto refresh setting

☑ Enable Auto Refresh

○ 3 Minutes ● 5 Minutes

○ 10 Minutes

Refresh in every [−] 5 [+] Minutes
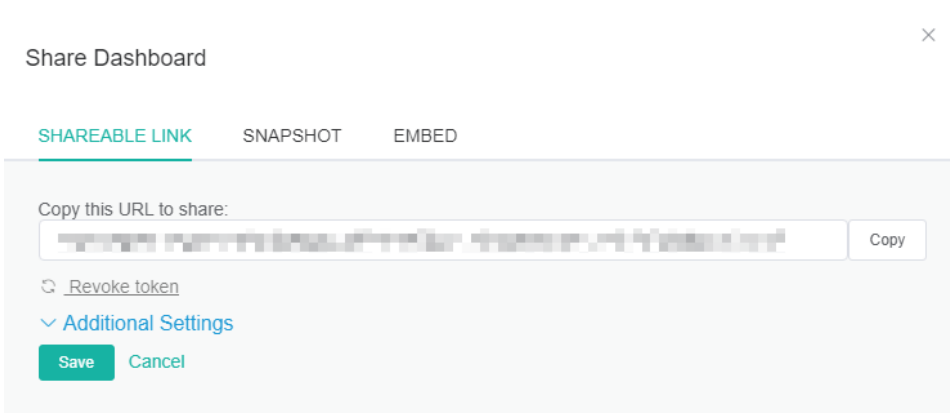
Submit

Widget Auto-refresh Rule

ⓘ *The following rules apply once the auto-refresh feature is enabled and the refresh interval is set:*

  ○ *If the current time when you open the dashboard is equal to or later than the last refresh time plus the auto-refresh interval, then the page will refresh automatically. A new countdown will start from the current time.*

    Example: The last refresh time is 9:00 and the auto-refresh interval is set to 5 minutes.
    If you access the dashboard at 9:08, it will automatically refresh once and start a new auto-refresh timer at 9:08.

  ○ *If you open the dashboard before the last refresh time plus the auto-refresh interval, the dashboard will not refresh. It will refresh automatically when the set interval is reached.*

    Example: The last refresh time is 9:00 and the auto-refresh interval is set to 5 minutes.
    Using the same example, the dashboard will not refresh if you access it at 9:02, which is earlier than 9:00 and the set refresh at 5 minutes. If you stay on the page until 9:05, the dashboard will automatically refresh at 9:05. However, if you leave the page before 9:05, the last refresh time will remain at 9:00.

  ○ *The dashboard will follow the set auto-refresh interval while it is open, and the automatic page refresh will stop when the dashboard is closed.*

- **Share your report** - Click 🔗 to share the report via shareable link, snapshot, and embedding.

Share Dashboard   ✕

SHAREABLE LINK   SNAPSHOT   EMBED

Copy this URL to share:

[   ] [Copy]

↻ Revoke token

⌄ Additional Settings

Save Cancel

For more information on sharing your report; refer to the following pages:
  ○ How to Share a Dashboard Using the Shareable Link Function
  ○ Sharing a Dashboard Using the Snapshot Function
  ○ How to Share A Dashboard Using the Embed Function (HTML)

- **Delete your report** by clicking 🗑️ .

- **Create a schedule for sending your report**. Click the Schedule Report 📤 icon for this. Refer to the section on How to Create a Scheduled Report for guided instructions.

- **Export a PDF** copy of your report. - Click to export the report in PDF format.
  - When it displays **Your dashboard was exported successfully**, it means that the PDF file has been exported successfully and will be automatically downloaded. You can check the downloaded file in **Downloads** of your browser.
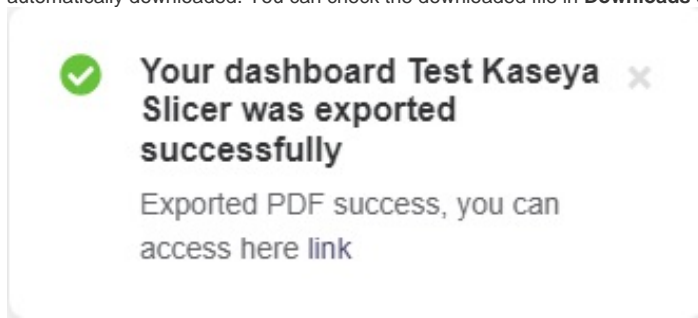
If the report contains a slicer with the QueryParams="Company", the exported PDF file name includes the company name obtained from the slicer with QueryParams="Company". For example, if a report has a Company slicer=*mspbots*, then the exported PDF file name will include the company name *mspbots*.

If the report does not contain a slicer with the QueryParams="Company", the exported PDF file name does not display the company name.

- **Send a filtered dashboard** for the associated company of each recipient.
  - This option only appears when there is a slicer with QueryParams="**Company**" in the dashboard.
  - If you select this option, scheduled reports will be sent with filters according to the recipients' mapped company. For this, you need to configure the PSA by selecting an option from the PSA dropdown menu. The available options are **Autotask, ConnectWise, Kaseya, Syncro,** and **Halo**.
- **Save Slicer.** This option only appears when the dashboard has a slicer, excluding the Company slicer .

The **Save Slicer** option is ON by default. When this optio is ON, the current slicer selection is saved and applied to the scheduled reports.
The slicers displayed in your dashboard are set during dashboard creation. If you need to modify the slicers, go to the dashboard and click **Design** > **Add Widget** to add or delete slicers.
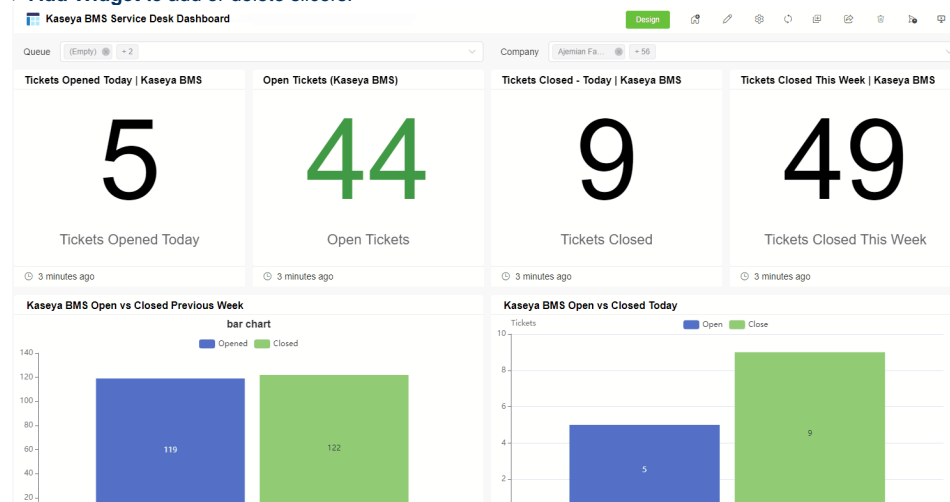
- **View logs**. Click the **Log** tab to view the record of the sent schedule reports, including the following information.
  - Status
  - Report Name
  - Sent Timestamp
  - Recipients
  - Saved Slicer(s)

Related Topics

- How to Create and Use Dashboards in MSPbots
- How to Create Scheduled Reporting for Dashboards and Reports
- How to Add Your Screen to the MSPbots Device List
- How to Share A Dashboard Using the Embed Function (HTML)
- Presenting Dashboards Using the Rotating Dashboard View