Reports

Reports allows you to view information from an object schema in nearly any way, and then view that information, share it with your team, or display it on a dashboard on Confluence page. Insight for Server/Data Center includes eight premade reports, but you can also create your own custom reports using the Insight Widget Framework.

Report types

Insight has powerful and dynamic reports that allows you to view information about your object schema in a variety of formats. You can create a report based on any of the default report types. If you are a developer, you can also use the Insight Widget Framework to develop your own custom report types.

There are nine types of reports available. The Attribute value count report is a pie chart showing how the objects of an object type are distributed based on attributes.

The Attribute value report is a chart showing attributes totals reported for one or more objects of a specific type.
The **Catalog report** is a catalog of objects and their attributes.

The **Issue count report** is a line or bar chart showing historical totals of issues reported for one or more object types or objects.

The **Object count report** is a line chart showing historical totals of objects for one or more object types.

- How to create a new object search
- How to share object search results
- How to export object search results
- How to add or remove a filter from favorites
- How to share a filter
The **Payroll report** is a chart showing payroll expenditures.

The **Two-dimensional report** returns a table showing the objects of an object type and their attributes.

The **User report** returns a table showing the total of one or more objects assigned to one or more users.
The Object search report is based on a saved quick search (filter) from the Insight Object Search View. It’s a table showing the objects of an object type and their attributes. When you open an object search report, you can click on the Quick search link to view the filter that generates the table.

Creating a new report

You can create a new report by clicking Insight > Reports and then New report at top-right.

Create a report - a customized view of information about your object schema. There are seven pre-existing reports available, or you can create your own by developing it using our Insight Widget Framework.

1. Click Insight > Reports.
2. In the Report manager, click New report at top-right.
3. Select from the list of available reports.
4. In the New report dialog box, complete all of the required parameters.
5. Click Preview to see a preview of the report, or click Create to generate a new report.

You don't need any special permissions to create a report. However, you must have access to the object schema or object type that you are reporting on to see the data.

Using the report manager
Once you have created a report, it's added to the **Report manager**. You can use this screen to view, filter, and order all of the the reports you have created or others have shared with you.

**Group reports** to view them organized into groups sorted by label, owner, or type.

1. Click **Group by** at top-right.
2. Select one of the following options:
   a. **Label** - group reports based on labels.
   b. **Owner** - group reports based on who created the report.
   c. **Type** - group report based on the six report types available.

**Order reports** to organize your visible reports alphabetically, reverse-alphabetically, by most recent, or by oldest.

1. Click **Order by** at top-right.
2. Select one of the following options:
   a. **Order by A-Z**
   b. **Order by Z-A**
   c. **Most recent**
   d. **Oldest**

Reports can be viewed as a list, or as a series of cards.

**View your reports as a list, or as a series of cards.** You can change between these two views in the Report Manager.

1. Click the **icon** at top-right.
2. Select between:
   a. **Card View** - view the reports as a series of cards.
   b. **List View** - view the reports as a series of rows in a list.
You can also use the Report manager to filter the visible reports. Use the Filters at left to select reports by name, reports by author, reports by label, favorite reports, only those reports shared with you, or only those reports shared by you.

Filter a report to view only favorite reports, reports shared with you, reports shared by you, reports of a certain name, labelled reports, or reports with a particular owner.

1. Under Filters at left, select from the following. If you select more than one option, the filter will show only those reports that fulfill all requirements.
   a. **My favorites** - displays only those reports that are your favorites.
   b. **Shared with me** - displays only those reports that others have shared with you.
   c. **Shared by me** - displays only those reports that you have shared with others.
   d. **Report name** - enter a name or partial name.
   e. **Labels** - select one or more labels. If you select more than one label, the filter will show only those reports that have all labels.
   f. **Owned by** - displays only those reports owned by the person selected.

   To clear the filter and remove all selected options, click **Clear filter**, at bottom.

If you click on the individual reports, you can favorites or unfavorite a report, share it with your team, re-sync it with your data, print a report, edit the report, add labels, or delete it entirely.

Favorite your reports in the Report Manager to make finding them easier. To favorite or unfavorite reports in the Report manager:

1. Click on the options icon for a report.
2. In the dropdown, click **Add to favorites** to favorite or **Remove from favorites** to unfavorite the report. A message similar to the following should appear:
Share a report to make it viewable, editable, or even removable by a user or group. Shared reports are based upon the permissions of the author, so they may contain information that is normally unavailable to some users or groups.

1. Click on Insight > Reports to view the Report manager.
2. Select the report you wish to share.
3. Click on the options icon on the report.
4. In the dropdown, click Share to share the report.
5. In the dialog box:
   a. Choose a user or group to share with.
   b. Choose the permissions you wish to grant:
      i. View - users or groups you share the report with can only view this report.
      ii. Edit - users or groups you share the report with can view and edit this report.
      iii. Delete - users or groups you share the report with can view, edit, and even delete this report.
6. Click Share, at bottom.

**Warning:** Shared reports are based upon the permissions of the author. They may contain information that is normally unavailable to some users or groups.

Resync a report to manually update it with the current data. This may take several minutes - or much more - to complete, based upon the amount of data involved.

1. Click on Insight > Reports to view the Report manager.
2. Select the report you wish to resynchronize.
3. Click on the options icon for a report.
4. In the dropdown, click Resync to resynchronize the report. You will receive a message saying: "Report Updated. Data re-sync was successfully requested." This indicates that the report is now re-syncing with the server.
5. Click the Refresh button in the top bar to immediately update the information visible.

**Warning:** Resyncing a report may take several minutes - or much more - to complete, based upon the amount of data involved.

Send a report to a printer, or save it as a PDF or to Google Drive.

1. Click Insight > Reports.
2. Create a new report, or select a report from the list.
3. Click on the options icon at top-right, and select Print.
4. In the dialog box, select a print Destination, number of Pages, and Layout.
5. Click Print.
Edit a report in the Report Manager to change the name, description, or the information displayed in the report.

1. Click on the options icon for a report.
2. In the dropdown, click Edit.
3. In the dialog box, modify the parameters of the report.
4. Click Update.

Add or remove labels from a report to change where the report is grouped or displayed in the Report Manager.

1. Click on the options icon for a report.
2. In the dropdown, click Edit.
3. In the dialog box under Labels, add or remove labels from the report.
4. Click Update.

Delete a report to remove it permanently.

1. Click on the options icon for a report.
2. In the dropdown, click Delete.
3. In the warning dialog box, click Delete.

Displaying a report on a dashboard

Any saved report can also be used within the Insight Widget to display information on a Jira Dashboard.

Want to display up-to-date reporting on a dashboard? Once you’ve saved a report, you can automatically use it as an Insight Widget.

First, create a report by clicking Insight > Reports > New report.
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1. Click Insight > Reports.
2. In the Report manager, click New report at top-right.
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Next, go to your dashboard and add a new gadget. Select the Insight Widget.

![Insight Widget](image)

Add an Insight Widget - a custom tool that can be used to display Insight reports or other information in a Jira Dashboard, Confluence page, or other locations.

1. On your dashboard, go to Add gadget at top-right.
2. From the list of available gadgets, select the Insight Widget. If not all gadgets are loaded in your dashboard, click Load all gadgets at top to see all available gadgets.
3. The Insight Widget will be automatically added to your dashboard.
4. Configure the widget:
   a. Widget - Select which widget to display. All of your saved reports will be available here, as well as any other Insight Widgets you have installed.
   b. Refresh Interval - Select an interval to refresh the widget.
5. Click Save at bottom to add the configured widget.

That's it. Now your saved report is visible on the dashboard, and will automatically be kept up to date.