

Jack and the JSM Challenge, Part Two: How Custom PDF Reports Saved the Day

Things have been going great for your company since you switched to [Atlassian Jira Service Management](#). Your workflow continues to improve and your team is enjoying the added features and functionality. You've even started exploring some of the apps on the Atlassian Marketplace, including [Raley Emails Notifications](#) to fit the missing bits.

Using Raley Emails Notifications, your team was able to overcome its first big puzzle which you code-named the "[Service Desk Challenge](#)." Now you can automatically send out email notifications, customized with your company's branding, the ability to include attachments and more. Customers love it and it's been smooth sailing ever since...

Except that lately, you've realized you might have a new Service Management Challenge to solve. The reports.

Send Me a Report?

"Jack, how are we doing on issues? Can you send me a report?" It's Bill from management again. He's thrilled with the switch to JSM. It's a huge step up from the old spreadsheets. It's clear to everyone from the work happening that productivity is up. Support agents say customers are happier, too. But Bill wants to know more.

One of the great features you've discovered in JSM is the ability to track almost everything. From issue volume to backlogs, resolution time, first contact resolutions and more, you've got plenty of metrics to help your team iterate better processes for service and support. But accessing and analyzing all that data isn't super user-friendly.

JSM can do a lot, but that also makes it more complicated to use. You could try showing Bill around the dashboard, but it would probably be overwhelming. It's easier for him if you pull out the data points he needs and type up a quick report for him when he asks. But lately, you've been writing a lot of reports...

Can We See More Data?

"Wow, this is great information! Have any more data you can share?" You look over the email Bill has just forwarded you from Tom at corporate. He tells you how everyone is really impressed with the new metrics. Data is a hot topic and everyone is looking for more of it to stay ahead of the curve. Bill goes on to explain what else is on his data wishlist — and it's a tall order.

Bill says he's looking for several different kinds of reports that he can regularly share with Tom and the other stakeholders. He wants to know if the system can be audited so that metrics from week to week can be tracked and studied. "Are things improving, staying the same or getting held up? And where are these bottlenecks and how could we fix them?" he wonders.

Bill's request makes total sense from a business standpoint, but it will be a lot of work to create these reports manually. JSM excels at tracking metrics, but not at spitting them out into polished PDF reports tweaked to show just the kind of info Bill wants. Plus, there's no native functionality to automate the process.

What to Do About These Reports?

Even though it's extra work for you, you realize that these reports are really helping the company. Bill and Tom have new insight and are making decisions that help the team and improve customer experience. You've just got to find a way to make doing these reports easier and faster!

Suddenly, you have a flashback to when you faced your first "Service Desk Challenge." You had briefly considered implementing your own custom email notification solution, until you realized all the effort it would take:

1. Getting the requirements right (the first time).
2. Finding (and paying for) a Jira consultant.
3. Implementing the solution on the Jira platform.
4. Maintaining it to be compatible with Jira updates.
5. And hoping no one requests any more extras.

Instead of doing all that, you found a specialized app that had saved the day. [Raley Email Notifications for Jira and JSM](#) was available right on on the official Atlassian Marketplace and it worked great, helping you solve your first "Service Desk Challenge."

Now you find yourself in a similar situation. You're thinking about what you can do when suddenly you get an email...

What About Raley's New PDF Reports?

The email is from Raley Apps. Can you believe it? It says that they have just added a new feature to Raley Email Notifications — reports!

You try to contain your excitement as you review the app's new [Issue PDF Snapshots feature](#) to see if it will work for Bill and Tom's needs. Raley says the new feature gives you the ability to:

1. Share information from Jira with all your stakeholders using custom, professional-looking PDF reports.
2. Create reports that contain data from either one Jira issue or multiple Jira issues, as needed.
3. Share your reports with all the users you need to, both internal and external.
4. Schedule regular report "snapshots" to be sent to your stakeholders automatically.
5. Choose how often your automatic reports will be sent out (daily/weekly/monthly).
6. Customize the way you do your reporting to keep your stakeholders informed and help conduct audits.
7. Dynamically render your report's Jira content and have full control over the content, labels, logos, layout, etc.
8. Create your own report templates easily using the Microsoft Office or OpenOffice Writer tools you already have.

From the looks of it, this new app functionality sounds like it will do everything Bill and Tom want for their reports. Best of all, it sounds like it will also save you a lot of time!

Raley Apps has excellent [support and documentation](#), so getting up to speed on the app's new capabilities is fast and easy. "What's really great is that we didn't have to buy or install anything new! Functionality of Issue PDF Snapshots is already part of Raley Email Notifications!" You're explaining everything to Tom, who is looking at the new Jira reports you're able to produce now, thanks to the new feature.

"And you were able to do all this with our Jira system and Raley Email Notifications?" Bill asks. "Yes!" you explain. "As a Raley user, all we had to do was supply a template file with placeholders in Velocity format. Then we could set up the trigger for creating a Snapshot and decide what to do with the generated report. Plus, it can be automated!"

Bill says Tom is also impressed with these reports. The company is using its new audit capabilities to solve all sorts of challenges, saving time and money. Now, thanks to Issue PDF Snapshots in Raley Email Notifications, it looks like you can call Part Two of the "Service Desk Challenge" a complete success!

Give Raley Email Notifications for Jira a try at your helpdesk and get your customers more engaged with your service team! [Free for the first 30 days!](#)