

Creating a report to specific team members usage

Objective: To generate a report on the total amount of cases one team member has been assigned, breaking down the total amount of current open and closed cases whilst giving an overview of average response time of a team member.

1. On the Reports page, click New Report, search for Cases and select Start Report

The screenshot shows the 'Create Report' interface. On the left, the 'Category' sidebar is visible with 'All' selected. The main area displays a search for 'case' and a list of report types. The 'Cases' report type is selected, showing a 'Start Report' button. The 'Details' panel on the right shows the selected report type 'Cases' and a list of users: Louise, Ana, and Sameenah.

2. Under the Columns section on the left, add Case Number and the new column will appear in the report. Drag the column to the beginning of the report. Click refresh to see the changes.

The screenshot shows the report preview interface. The 'Columns' section on the left shows 'Case Number' added and moved to the beginning of the report. The main area displays a table of case records with columns for Case Number, Case Owner, Account Name, Subject, Date/Time Opened, Age, Open, and Closed.

Case Number	Case Owner	Account Name	Subject	Date/Time Opened	Age	Open	Closed
1 00221607	AskQM	SABA FAHHAM	Dental research position	06/04/2025, 15:50	114	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2 00219330	SITS Integration	EFE BOYRAZ	Enquiry re Provided copy of BRP or share code	11/03/2025, 16:54	736	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3 00217627	SITS Integration	its-applications-dev-team	Data Alert: - sirspt - SCE Record with no matching CBO	30/01/2023, 06:52	19,250	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4 00057983	SITS Integration	JESSICA SIN YUE YIU	Re: [EXTERNAL] Request for tuition fee receipt	10/08/2023, 14:51	21	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5 00057985	SITS Integration	OLATUNJI OLUWASEUN OLADEJI	Late Summer Resit (Random Processes)	10/08/2023, 14:57	671	<input type="checkbox"/>	<input checked="" type="checkbox"/>
6 00057987	SITS Integration	yb527039787	Refund	10/08/2023, 15:06	165	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7 00057989	SITS Integration	QASIM HAFEEZ	Tuition Deposit Paid - URGENT	10/08/2023, 15:13	19	<input type="checkbox"/>	<input checked="" type="checkbox"/>
8 00057990	SITS Integration	noreply	Notification of module mark change	10/08/2023, 15:21	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9 00057991	SITS Integration	ZHU LI	Urgent! About my re-enrollment and new visa	10/08/2023, 15:21	114	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 00057993	SITS Integration	THI THANH THẢO HOÀNG	Fwd: Tuition Payment	10/08/2023, 15:31	20	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11 00057994	SITS Integration	OLATUNJI OLUWASEUN OLADEJI	Late Summer Resit	10/08/2023, 15:36	671	<input type="checkbox"/>	<input checked="" type="checkbox"/>
12 00058012	SITS Integration	CHUN HEI LAU	ATAS Enquiry	10/08/2023, 16:42	475	<input type="checkbox"/>	<input checked="" type="checkbox"/>
13 00058019	SITS Integration	MASA MELHEM	Graduate route visa email	10/08/2023, 17:22	114	<input type="checkbox"/>	<input checked="" type="checkbox"/>
14 00058029	SITS Integration	ANNE CHINENYE ONYEGBOSI	Seat Number Missing	10/08/2023, 18:36	668	<input type="checkbox"/>	<input checked="" type="checkbox"/>
15 00058035	SITS Integration	ANUKRITHI KRISHNAMURTHI	Info on Graduate Visa	10/08/2023, 19:42	160	<input type="checkbox"/>	<input checked="" type="checkbox"/>
16 00058039	SITS Integration	pplawoffice	RE: Graduate route visa email	10/08/2023, 20:00	13	<input type="checkbox"/>	<input checked="" type="checkbox"/>

- Go to the Filters, select Opened Date > Customize and then set start date from 7th April then click Apply. Click 'refresh' to see the changes.

The screenshot shows the 'Enquiry Management' software interface. The 'Report Builder' tab is active, and a report titled 'New Report' is being configured. The 'Filters' panel on the left shows 'Opened Date' selected. The main table displays a list of cases with columns for Case Number, Case Owner, Account Name, Subject, Date/Time Opened, Age, Open, and Closed. A 'Filter by Opened Date' dialog box is open, showing the 'Date' set to 'Opened Date', 'Range' set to 'Custom', and 'Start Date' set to '07/04/2025'. The 'Apply' button is highlighted.

Case Number	Case Owner	Account Name	Subject	Date/Time Opened	Age	Open	Closed
11	00057994	SITS Integration	OLATUNJI OLUWASEUN OLADEJI	Late Summer Resit	10/08/2023, 15:36	671	<input type="checkbox"/>
12	00058012	SITS Integration	CHUN HEI LAU	ATAS Enquiry	10/08/2023, 16:42	475	<input type="checkbox"/>
13	00058019	SITS Integration	MASA MELHEM	Graduate route visa email	10/08/2023, 17:22	114	<input type="checkbox"/>
14	00058029	SITS Integration	ANNE CHINENYE ONYEGBOSI	Seat Number Missing	10/08/2023, 18:36	668	<input type="checkbox"/>
15	00058035	SITS Integration	ANUKRITHI KRISHNAMURTHI	Info on Graduate Visa	10/08/2023, 19:42	160	<input type="checkbox"/>
16	00058039	SITS Integration	pgjawoffice	RE: Graduate route visa email	10/08/2023, 20:00	13	<input type="checkbox"/>

- In the filters search bar, search Case Owner, set Operator to Equals and type the name of the person you are creating the report for then click apply. Click refresh.

The screenshot shows the 'Enquiry Management' software interface. The 'Report Builder' tab is active, and a report titled 'New Report' is being configured. The 'Filters' panel on the left shows 'Case Owner' selected. The main table displays a list of cases with columns for Case Number, Case Owner, Account Name, Subject, Date/Time Opened, Age, and Open. A 'Filter By' dialog box is open, showing the 'Field' set to 'Case Owner', 'Operator' set to 'equals', and the name 'Maisie Downie' entered. The 'Apply' button is highlighted.

Case Number	Case Owner	Account Name	Subject	Date/Time Opened	Age	Open
1	00221651	Ellen Paine	Hello	07/04/2025, 00:36	15	<input type="checkbox"/>
2	00221652	Waled Mohamed	Hello	07/04/2025, 00:36	11	<input type="checkbox"/>
3	00221653	SOH - Programme & Module Support	possible aestroid found	07/04/2025, 00:43	106	<input checked="" type="checkbox"/>
4	00221654	SOH - Programme & Module Support	3rd Annual Chief Risk Officer Conference Bangkok May 2025-Registrations Closing	07/04/2025, 00:48	11	<input type="checkbox"/>
5	00221655	SOH - Programme & Module Support	Mile End, People's Palace - Music Rooms Booking Confirmation	07/04/2025, 01:06	15	<input type="checkbox"/>
6	00221656	SOH - Programme & Module Support	UG - PROGRAMME CHANGE REQUEST	07/04/2025, 01:13	81	<input type="checkbox"/>
7	00221657	SOH - Programme & Module Support	UG - Re: Arranging meeting with student	07/04/2025, 01:49	7	<input type="checkbox"/>
8	00221658	SOH - Programme & Module Support	PG - Re: Request for Meeting Regarding Exam Resits	07/04/2025, 01:56	87	<input type="checkbox"/>
9	00221659	SOH - Programme & Module Support	urgent enquiry	07/04/2025, 01:58	12	<input type="checkbox"/>
10	00221660	SOH - Programme & Module Support	UG - Queries about a gap year application for 2025-2026	07/04/2025, 02:00	56	<input type="checkbox"/>
11	00221661	SOH - Programme & Module Support	PG - My Suicidal Date: May 8th	07/04/2025, 02:19	13	<input type="checkbox"/>
12	00221662	SOH - Programme & Module Support	Attention bursaries you have (3) delayed E-mails	07/04/2025, 02:37	7	<input type="checkbox"/>
13	00221663	SOH - Programme & Module Support	Attention studentenquiry you have (3) delayed E-mails	07/04/2025, 02:39	9	<input type="checkbox"/>
14	00221664	SOH - Programme & Module Support	Private Banking Notification - Important Beneficiary Inquiry	07/04/2025, 02:49	8	<input type="checkbox"/>
15	00221665	SOH - Programme & Module Support	Private Banking Notification - Important Beneficiary Inquiry	07/04/2025, 02:52	7	<input type="checkbox"/>

5. Click the arrow on the Age column > click Summarise and then Average

The screenshot shows the 'Enquiry Management' report builder interface. The 'Age' column header has a dropdown arrow. The context menu is open, showing options like 'Sort Ascending', 'Sort Descending', 'Group Rows by This Field', 'Summarize', and 'Bucket This Column'. The 'Summarize' option is expanded, and 'Average' is selected. The table below shows 12 rows of case data.

Case Number	Case Owner	Account Name	Subject	Date/Time Opened	Age	Open	Closed
1	00223196	Maisie Downie	Bashir Moahmoud	Digital Award Letter Order		<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	00222810	Maisie Downie	tyelimbetov	(Transcript Payment Email) Digital Transcript Order		<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	00222111	Maisie Downie	HUSNA BEGUM HUSSAIN	I would like to Appeal on be half of the degree in which I have received		<input type="checkbox"/>	<input checked="" type="checkbox"/>
4	00222142	Maisie Downie	OMSHREE ANILKUMAR GHATGE	Request to Defer Graduation Ceremony from Spring to Winter		<input type="checkbox"/>	<input checked="" type="checkbox"/>
5	00222240	Maisie Downie	-	get a Yeti Crossroads Backpack from Mountain Warehouse!		<input type="checkbox"/>	<input checked="" type="checkbox"/>
6	00221958	Maisie Downie	Parnian Mohammadi	Verifying degree		<input type="checkbox"/>	<input checked="" type="checkbox"/>
7	00222032	Maisie Downie	CRISTINA PATRICIA BARKER SILVA	Email problem		<input type="checkbox"/>	<input checked="" type="checkbox"/>
8	00222019	Maisie Downie	Parnian Mohammadi	Previous enquiry closed without response		<input type="checkbox"/>	<input checked="" type="checkbox"/>
9	00222024	Maisie Downie	dpowell	Replacement of LLM certificate		<input type="checkbox"/>	<input checked="" type="checkbox"/>
10	00222685	Maisie Downie	AHMAD SAFAALDIN HASSAN	Legal Name Change		<input type="checkbox"/>	<input checked="" type="checkbox"/>
11	00222774	Maisie Downie	KAIWEI LIU	Changing the degree certificate mailing address		<input type="checkbox"/>	<input checked="" type="checkbox"/>
12							

6. Click the arrow on the Open column > click Group Rows by This Field

The screenshot shows the 'Enquiry Management' report builder interface. The 'Open' column header has a dropdown arrow. The context menu is open, showing options like 'Sort Ascending', 'Sort Descending', 'Group Rows by This Field', 'Group Columns by This Field', 'Summarize', and 'Show Unique Count'. The 'Group Rows by This Field' option is highlighted in yellow. The table below shows 12 rows of case data, with the 'Age' column now displaying values and an average of 5.727.

Case Number	Case Owner	Account Name	Subject	Date/Time Opened	Age	Open	Closed
1	00223196	Maisie Downie	Bashir Moahmoud	Digital Award Letter Order	10/04	<input type="checkbox"/>	<input type="checkbox"/>
2	00222810	Maisie Downie	tyelimbetov	(Transcript Payment Email) Digital Transcript Order	09/04	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	00222111	Maisie Downie	HUSNA BEGUM HUSSAIN	I would like to Appeal on be half of the degree in which I have received	07/04	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4	00222142	Maisie Downie	OMSHREE ANILKUMAR GHATGE	Request to Defer Graduation Ceremony from Spring to Winter	07/04	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5	00222240	Maisie Downie	-	get a Yeti Crossroads Backpack from Mountain Warehouse!	08/04	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
6	00221958	Maisie Downie	Parnian Mohammadi	Verifying degree	07/04	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
7	00222032	Maisie Downie	CRISTINA PATRICIA BARKER SILVA	Email problem	07/04	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
8	00222019	Maisie Downie	Parnian Mohammadi	Previous enquiry closed without response	07/04	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
9	00222024	Maisie Downie	dpowell	Replacement of LLM certificate	07/04	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10	00222685	Maisie Downie	AHMAD SAFAALDIN HASSAN	Legal Name Change	09/04	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
11	00222774	Maisie Downie	KAIWEI LIU	Changing the degree certificate mailing address	09/04	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
12							

- Click Add Chart and then go to Chart Properties which can be found by the little cog icon above the chart, to the right.

The left screenshot shows a table with the following data:

Subject	Date/Time Opened	Age
(Transcript Payment Email) Digital Transcript Order	09/04/2025, 16:02	18
I would like to Appeal on be half of the degree in which I have received	07/04/2025, 20:05	15
Request to Defer Graduation Ceremony from Spring to Winter	07/04/2025, 23:19	11
get a Yeti Crossroads Backpack from Mountain Warehouse!	08/04/2025, 10:40	11
Verifying degree	07/04/2025, 14:25	0
Email problem	07/04/2025, 15:53	0
Previous enquiry closed without response	07/04/2025, 15:30	0
Replacement of LLM certificate	07/04/2025, 15:43	0
Legal Name Change	09/04/2025, 13:12	0
Changing the degree certificate mailing address	09/04/2025, 15:19	0
		Avg: 4.5
Digital Award Letter Order	10/04/2025, 16:38	18
		Avg: 18
		Avg: 5.727

The right screenshot shows a 'Sum of Closed' bar chart. The 'Chart Properties' panel is open, showing 'Donut' selected as the chart type. The chart title is 'Total Cases' and the value is 'Record Count'.

- Click the chart you would like to use (here I've selected donut), title it 'Total Cases', change the Value to Record Count, ensure Sliced by is set to Open and tick Show Values. You can then Name the report after the person on the left-hand side (rename it from 'New Cases Report' and click Save and Run on the right-hand side.

The screenshot shows the 'Enquiry Management' report builder interface. The 'Total Cases' donut chart is displayed with a value of 11. The 'Chart Properties' panel is open, showing 'Donut' selected as the chart type, 'Total Cases' as the chart title, and 'Record Count' as the value. The 'Sliced By' field is set to 'Open' and 'Show Values' is checked.

The table below shows the data for the 'Total Cases' chart:

Open	Closed	Case Number	Case Owner	Account Name	Subject
<input type="checkbox"/>	<input checked="" type="checkbox"/>	00222810	Maisie Downie	lyelimbetov	(Transcript Payment Email) Digital Transcript Order
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	00222111	Maisie Downie	HUSNA BEGUM HUSSAIN	I would like to Appeal on be half of the degree in which I have received
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	00222142	Maisie Downie	OMSHREE ANILKUMAR GHATGE	Request to Defer Graduation Ceremony from Spring to Winter
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	00222240	Maisie Downie	-	get a Yeti Crossroads Backpack from Mountain Warehouse!
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	00221958	Maisie Downie	Parnian Mohammadi	Verifying degree
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	00222032	Maisie Downie	CRISTINA PATRICIA BARKER SILVA	Email problem
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	00222019	Maisie Downie	Parnian Mohammadi	Previous enquiry closed without response

Report Duplication:

Once you have complete one person's report, you can duplicate this by:

1. Open the report you'd like to duplicate
2. Clicking the arrow on the Edit button

The screenshot shows the 'Enquiry Management' interface. At the top, there's a search bar and navigation icons. Below that, the 'Report Cases' section for 'Maisie Example' is visible. It includes summary statistics: Total Records: 11, Total Closed: 10, Average Age: 5.727. A donut chart titled 'Total Cases' shows a record count of 11, with 10 closed and 1 open. Below the chart is a table with columns for Case Number, Case Owner, Account Name, Subject, Date/Time Opened, and Age. The table is currently empty. A context menu is open over the 'Edit' button, showing options: Save As, Save, Delete, Add to Dashboard, and Open (with radio buttons for false and true).

3. Click Save As and save the new report as the next person you are creating one for
4. On the new report click Edit, go to the Case Owner filter and change the name to the person who you would like the report to apply to.

The screenshot shows the 'Report Builder' interface for 'Emma Example'. It features a 'Filters' panel on the left with 'Case Owner' set to 'equals Maisie Downie'. A 'Filter By' dialog box is open, showing 'Field: Case Owner', 'Operator: equals', and 'Value: Emma Shapcott'. A donut chart titled 'Record Count' shows a total of 16 records, with 4 closed and 12 open. Below the chart is a table with columns for Account Name, Subject, Date/Time Opened, Age, and Closed. The table contains 16 rows of data.

Account Name	Subject	Date/Time Opened	Age	Closed
Rian Mohammadi	Verifying degree	07/04/2025, 14:25	0	<input type="checkbox"/>
CHRISTINA PATRICIA BARKER SILVA	Email problem	07/04/2025, 15:53	0	<input type="checkbox"/>
Parnian Mohammadi	Previous enquiry closed without response	07/04/2025, 15:30	0	<input type="checkbox"/>
dpowell	Replacement of LLM certificate	07/04/2025, 15:43	0	<input type="checkbox"/>
HUSNA BEGUM HUSSAIN	I would like to Appeal on be half of the degree in which I have received	07/04/2025, 20:05	15	<input type="checkbox"/>
OMSHREE ANILKUMAR GHATGE	Request to Defer Graduation Ceremony from Spring to Winter	07/04/2025, 23:19	11	<input type="checkbox"/>
-	get a Yell Crossroads Backpack from Mountain Warehouse!	08/04/2025, 10:40	1	<input type="checkbox"/>
AHMAD SAFAALDIN HASSAN	Legal Name Change	09/04/2025, 13:12	0	<input type="checkbox"/>

5. Click Save and Run and the report will automatically update with the new persons data.