

Creating a Report – General Overview of Activities

This document provides step-by-step guidance for creating a report that offers an overview of a team/queue's activity. Once created, you can customise fields and filters to analyse a variety of metrics. The example provided in this guide will generate a report for individual team performance, however notes will be interlinked for commonly requested reports (i.e. breakdown of categories).

1. On the Reports page, click New Report > All > search for Cases > select Start Report:

Create Report

Report Type Name	Category
Cases	Standard
Case Lifecycle	Standard
Cases with Contact Roles	Standard
Cases with Emails	Standard
Cases with Articles	Standard
Case History	Standard
Cases with Milestones	Standard
Activities with Cases	Standard
Locations with Cases	Custom

2. Rename your report:

Enquiry Management Reports

REPORT

New Cases Report Cases

3. Click the arrow on the 'Case Owner' column and select 'Bucket this column':

Previewing a limited number of records. Run the report to see everything.

Case Owner	Account Name	Subject	Date/Time Opened	Age	Open	Closed
1 AskQM		Dental research position	06/04/2025, 15:50	215	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2 SITS Integrati		ENGMAL Enquiry re Provided copy of BRP or share code	12/03/2025, 08:51	1,035	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3 SITS Integrati		Enquiry re Provided copy of BRP or share code	12/03/2025, 08:59	1,034	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4 SITS Integrati		Enquiry re Provided copy of BRP or share code	12/03/2025, 08:22	1,035	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5 SITS Integra		Enquiry re Provided copy of BRP or share code	12/03/2025, 08:35	1,035	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6 SITS Integrati		Enquiry re Provided copy of BRP or share code	12/03/2025, 08:40	1,035	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7 SITS Integrati		Enquiry re Provided copy of BRP or share code	12/03/2025, 08:41	1,035	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8 SITS Integrati		Enquiry re Provided copy of BRP or share code	12/03/2025, 08:45	1,035	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9 SITS Integrati		Enquiry re Provided copy of BRP or share code	12/03/2025, 08:47	1,035	<input checked="" type="checkbox"/>	<input type="checkbox"/>
10 SITS Integrati		Incorrect Visa End Date	26/03/2025, 12:23	695	<input checked="" type="checkbox"/>	<input type="checkbox"/>
11 SITS Integrati		New share code from UKVI	14/03/2025, 23:02	972	<input checked="" type="checkbox"/>	<input type="checkbox"/>
12 SITS Integration	JIAHUI CUI	Enquiry re Provided copy of BRP or share code	12/03/2025, 08:37	1,035	<input checked="" type="checkbox"/>	<input type="checkbox"/>
13 SITS Integration	DOSTON ALLABERDI UGLI KHAKIMOV	Enquiry re Provided copy of BRP or share code	12/03/2025, 08:56	1,034	<input checked="" type="checkbox"/>	<input type="checkbox"/>
14 SITS Integration	MUHAMMED ENES OZ	Enquiry re Provided copy of BRP or share code	12/03/2025, 09:05	1,034	<input checked="" type="checkbox"/>	<input type="checkbox"/>
15 SITS Integration	PRIYANSHU DHURANDHAR	Enquiry re Provided copy of BRP or share code	12/03/2025, 09:12	1,034	<input checked="" type="checkbox"/>	<input type="checkbox"/>

4. Update the **'Bucket Name'**, click **'Add Bucket'** and then enter the same name:

Edit Bucket Column

*Field: Case Owner ×

*Bucket Name: FLT Overview

All Values (200+)

FLT Overview (0)

Unbucketed Values (200+)

Search Values

VALUE BUCKET

This bucket does not contain any values.

Bucket remaining values as Other

Add Bucket

Move To Enter Values

Cancel Apply

5. Click on **'Unbucketed Values'**, start typing the name of the user you wish to include in report, and tick the checkbox to select. Once checked, you can search for the next user, tick the checkbox and repeat to select all required users. Please then click on **'Move to'** and select the bucket you have just created:

Edit Bucket Column

*Field: Case Owner ×

*Bucket Name: FLT Overview

All Values (200+)

FLT Overview (0)

Unbucketed Values (200+)

Search Values: danny

VALUE BUCKET

Danny Riches

FLT Overview

Unbucketed Values

New Bucket

Add Bucket

Move To Enter Values

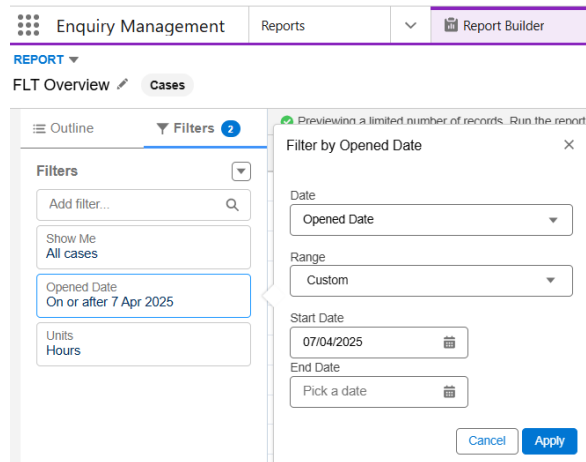
Cancel Apply

All users should now appear in the bucket. Click apply to save.

NOTE: All users and queues within the scope of your search must be included in the bucket. For example, if some cases are closed directly from the main queue while others are assigned to individual staff members, you will need to include both. I.e. the SBM – Programme and Module Support queue and the relevant individual users.

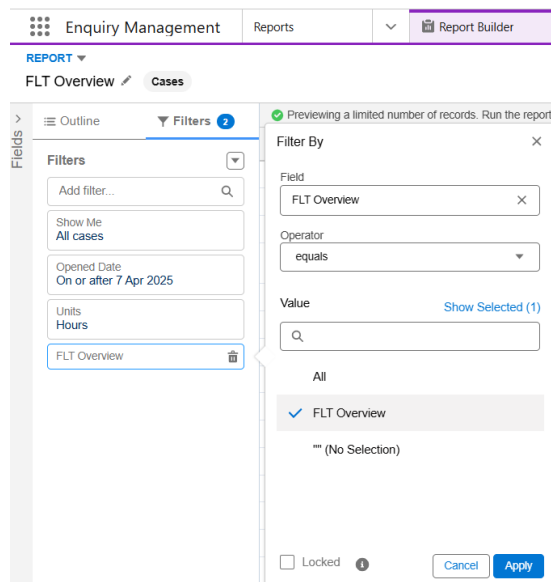
6. Now edit/apply filters:

- Edit: Opened date > Range = Custom > Select the required date range > Apply:



The screenshot shows the 'Filter by Opened Date' dialog box. The 'Date' dropdown is set to 'Opened Date'. The 'Range' dropdown is set to 'Custom'. The 'Start Date' is '07/04/2025' and the 'End Date' is 'Pick a date'. There are 'Cancel' and 'Apply' buttons at the bottom.

- Add filter: enter your bucket name (in this example FLT Overview) > Select the named bucket value > Apply:



The screenshot shows the 'Filter By' dialog box. The 'Field' dropdown is set to 'FLT Overview'. The 'Operator' dropdown is set to 'equals'. The 'Value' dropdown is set to 'Show Selected (1)'. There are 'Cancel' and 'Apply' buttons at the bottom.

7. Customise your columns via 'Outline', with suggested order as below. Please drag 'Case Owner' under 'Group Rows':

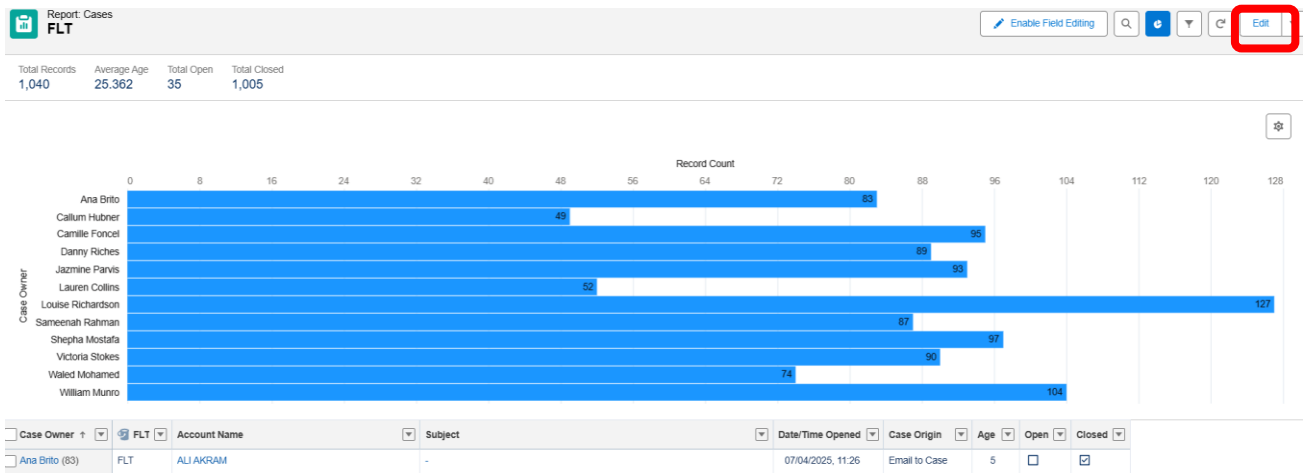
The screenshot shows the 'Enquiry Management' interface. On the left, the 'Outline' panel is visible, showing a 'Groups' section with 'GROUP ROWS' and 'Case Owner' listed. On the right, the 'Columns' panel is shown, listing various fields: FLT, Case Number, Account Name, Subject, Date/Time Opened, Case Origin, # Age, # Open, and # Closed. The 'Case Owner' field is highlighted in the 'Columns' panel.

NOTE: If you wish to review number of cases closed by sub-category, please add this column and drag 'Sub-Category' under 'Group Rows' instead.

8. Click 'Apply Chart', and click on the cog to select your preferred chart type and amend the X-Axis to 'Record Count':

The screenshot shows the 'Chart Properties' dialog box. The 'Chart Properties' section includes icons for Bar, Column, Stacked Bar, Stacked Column, Line, Donut, Funnel, and Scatter Plot. The 'Chart Attributes' section includes a 'Chart Title' field. The 'Y-Axis' is set to 'Case Owner'. The 'X-Axis' is set to 'Record Count'. A red box highlights the 'X-Axis' field, and another red box highlights the settings icon in the top right corner of the dialog.

9. Your report has now generated and will provide an overview of cases closed, average case age etc:



Should you wish to obtain stats of an individual, simply click on the bar beside their name.

Should you wish to amend the search criteria (i.e. date range), click on the edit button and then edit the applicable filter. Please note that every time a change is made, you will need to reapply the bucket filter (Step 6).