

## Standard and Custom reports

This article covers standard and custom reports, time selection in reports, report presentation, sorting, download report and more.

### The report list

On page Reports you will see a list of all the **Standard reports** you have access to.

The screenshot shows a web interface for 'Standard Reports'. At the top, there is a 'Filter' input box, radio buttons for 'Standard Reports' (selected) and 'Custom Reports', a search box for 'All Categories', and a 'Categories' button. Below this is a table with two columns: 'Report Name' and 'Description'. The table lists five reports:

Report Name	Description
Details for agents (ID) incl. time logged on	The report shows the number of calls offered to an agent, the number of calls answered, the answer rate (%), the average ring time, average speak time and ma...
Details per agent per queue	This agent report shows per agent-ID per queue the number of requests (calls/emails/chats/social requests) offered, answered, forwarded etc, as well as the tot...
Details per chat queue	The report shows the number of chats per queue, % answered and lost within n seconds, average and max waiting time and average and max chat conversation ...
Details per queue	The report shows a number of parameters per queue, e.g. Incoming calls, Total calls, Hung up, Answered, Callback-requests, Timeouts, Answer-rate, Average que...
Details per queue for email and social media	This queue report shows the number of requests RECEIVED per queue in this time period (column 1), and the number of requests ANSWERED (or deleted) in this ti...

If you tick the radio button 'Custom Reports', you will see a list of your company's **Custom reports**.

The screenshot shows a web interface for 'Custom Reports'. At the top, there is a 'Filter' input box, radio buttons for 'Standard Reports' and 'Custom Reports' (selected), a search box for 'All Categories', and a 'Categories' button. Below this is a table with four columns: 'Report Name', 'Custom Description', 'Category', and 'Based on'. The table lists three reports:

Report Name	Custom Description	Category	Based on
Chart - Queue overview for all media types	A chart	Category X	Queue overview for all media types
Dashboard Discussion test	This is my description		Details per queue
Details per agent per queue exclude	testing include and exclude in subscriptions		Details per agent per queue

Click the **edit icon** to update a custom report's description or change its Category.

Click on the **delete icon** to delete a custom report. A custom report that's used in a report subscription can not be deleted.

A Custom report is based on a standard report, but changes have been made to what rows and/or columns to show etc., and this customisation has been saved as a custom report. We recommend all custom reports be put in a relevant a Report Category to get a better overview.

You will have access to all standard and all custom reports in your Puzzel solution unless a resource filter containing selected reports and/or report categories limits what you have access to.

If you have access to an old **"Special"** report, it will appear in the Custom Reports list, with prefix "[Special]". Please note that Special reports are 'End of Support' and customers are required to rebuild any Special reports still in use via the Raw data solution, before 'End of Life' is announced.

You can search for a report by typing something in the Filter input box, and for Custom reports you can also select a report category in the list box to only show reports in the selected category.

If you click on a report in the list, the report's *Basic information*, *Report settings* and *Report parts* are shown.

The screenshot shows a web interface for configuring a report. It is divided into three main sections: 'Basic Information', 'Report Settings', and 'Report'.  
1. **Basic Information:** Contains a 'Report Name' field with the value 'Details per queue' and a 'Description' field with the value 'Lots of parameters per phone queue, e.g. Incoming calls, Total calls, Hung up, Answered, Callback-requests, Timeouts, Answer-rate, Av'. A 'Show Details' button is on the right. Callouts 4 and 5 are near the top right corner.  
2. **Report Settings:** Includes a 'Select Time Period' dropdown set to 'Yesterday (20/02/2024)', a 'Limit Time Range' toggle, a 'Time Range' button, a 'Show Settings' button, and a 'View Report' button. Callout 1 is on the date, and callout 2 is on the 'Show Settings' button.  
3. **Report:** A large empty rectangular area where the report data would be displayed. Callout 3 is on the 'View Report' button.  
At the bottom, there are 'Save as', 'Cancel', and 'Save' buttons.

From here you can

1. change **time period** if you want something else than Yesterday
2. click arrow down or **Show settings** to expand the settings part and adjust rows, columns etc
3. click **View report** to generate and see the report
4. click the **Minimise** icon to see the Report list in the left margin while still seeing the details for the selected report
5. click the **Close** icon to go back and only see the Report list
6. click arrow down or **Show details** in the **Basic information** part to expand and see the full report description and column descriptions

In the **Basic information** part when it's expanded, only the Active (shown) columns are listed, but if you tick *All columns* you will also see descriptions for the available columns not currently shown. Click arrow up (at the bottom of the section) or *Hide details* to collapse the Basic information part.

The screenshot shows the 'Basic Information' section of a report. On the left is a sidebar with a list of report names, where 'Details per queue' is highlighted. The main content area shows the report name 'Details per queue' with a 'Hide Details' button. Below this is a 'Description' section with a detailed paragraph explaining the report's parameters and a radio button to toggle between 'Active columns' (selected) and 'All columns'. At the bottom is a table with columns 'Column' and 'Description'.

Column	Description
Queue	The name of the queue
Incoming calls	The number of Incoming calls grouped by their first "chosen" queue. One incoming call counts only once in this column. Incoming calls which are not routed to a queue (e.g. if the caller hung up in an audio or menu module or if the contact centre is closed), is counted on the row without any queue name.
Total calls	The total number of calls that have been routed through each queue. One incoming call is counted in all queues it has been routed through. One incoming call that is answered by agent and transferred to another queue is counted in the 2 relevant queues. Total calls for a queue may be greater than the sum of Answered, Hung up, Timed out, Exiting and Callback, because there are other queue exits, e.g Full, No agents logged on, All agents in Pause.
No. of hung up	The total number of callers that hung up in each queue.
No. of hung up within 20 sec.	The number of callers that hung up in queue within 20 seconds.
Call-back requests	The number of callers that have opted for a call-back.
Timed out	The number of calls that timed out in this queue and were routed to another queue/place.
Exiting queue	Total number of times calls have been queued and the caller has chosen to leave the queue for another option.
Answered (excl call-backs)	The number of callers that were answered in each queue, excluding answered Call-backs.

## Report settings and time selection

In **Report settings**, you can click arrow down or **Show settings** to expand and see and possibly edit different settings like **rows** (agents/queues etc.) to include, **columns** to include, **visual type** etc. Click arrow up (at the bottom of the section) or **Hide settings** to collapse settings details.

If you have more than 1 **Service Number**, your main Service number should be the default selection, and you can select another Service number when needed. If you have a defined **Service Number Group** (aka Global service number), it will appear in the Service Number list box.

### Report Settings

The 'Report Settings' dialog box includes a 'Select Time Period' section with a calendar icon and a 'Limit Time Range' section with a toggle switch and a 'Time Range' button. There are 'Hide Settings' and 'View Report' buttons. The 'Additional Settings' section contains:
 

- Service Number:** A search field with '21492979' and a dropdown arrow.
- Visual Type:** A search field with 'Table' and a dropdown arrow.
- Select Queues:** A search field with 'Select' and a dropdown arrow.
- Select Columns:** A search field with 'Incoming calls', 'Total calls', 'No. of hung up', and 'No. of hung up...' (with a dropdown arrow showing '27').
- Group by time:** A search field with '(no grouping)' and a dropdown arrow.

A "Column order" button is shown in the lower right corner of the Settings part **only** if you have generated a report.

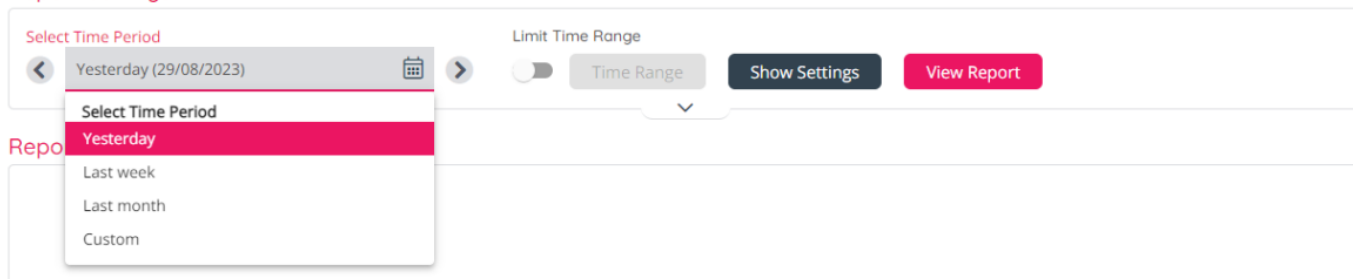
## Time selection

The default selected **time period** when you select a report is *Yesterday*. If you want to see the report for Yesterday, simply click *View Report*.

Click the **left arrow** to select an earlier day, or the **right arrow** to select the next day.

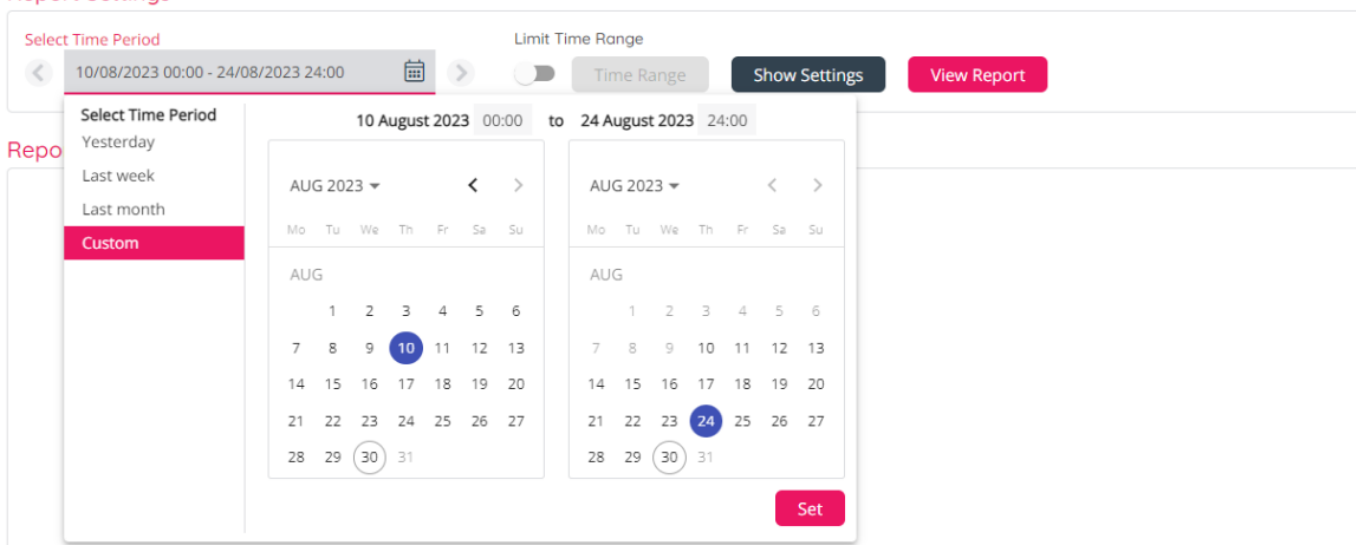
Click on the grey field (initially showing *Yesterday*) to open the list box and change to **Last week**, **Last month** or **Custom**.

### Report Settings



If you select **Custom**, a calendar appears, so that you can select any From and To date.

### Report Settings



Click on the relevant **From** date in the **left** calendar (default for From time is 00:00) and then click on relevant **To** date in the **right** calendar (default for To time is 24:00). If needed, adjust the values for hh:mm. After you have selected From and To, click **Set** and then click **View report** to generate and show the report.

### Re-arrange column order

If you expand the Settings part after a report is generated, you will see the *Column order* button. If you click *Column order*, a modal opens where you can drag and drop to re-arrange the column order.

When you have clicked *View Report*, the report is shown like this:

Queue	Incoming calls	Total calls	No. of hung up	No. of hung up within 20 sec.	Call-back requests	Timed out	Exiting queue	Answered (excl call-backs)	Answered call-backs	Answer rate (%)	Avg. time in queue for answered	Longest queue-time for answered	Avg. time in queue for hang up	Longest queue-time before hung up
Support	8	8	0	0	1	0	0	7	0	88%	Average wait time in this queue for caller's that waited in queue and were answered. (Callback is here excluded)	00:00:00	00:00:00	00
Sales	7	7	3	1	2	0	0	2	2	57%		00:00:38	00:00:58	00
Outbound	5	5	0	0	5	0	0	0	5	100%		00:00:00	00:00:00	00

Click on any **column header** to **sort** the table based on the values in this column. This is very useful if you like to see e.g. the agents with the most calls or longest put on hold, or the queues with longest wait time or most hang-ups.

If you hover the mouse over a column header, the **column description** is shown as a **tool tip**.

**From this Full screen mode you can:**

- change time period and click *View report*
- add this report to a Dashboard
- download the report as a csv/xlsx file
- press the ESC key or click *Exit full screen* (the arrows in the upper right corner) to show the Basic information and Report settings part

If you **Exit Full screen** mode it looks like this:

**Basic Information**

Report Name: Details per queue | Description: Lots of parameters per phone queue, e.g. Incoming calls, Total calls, Hung up, Answered, Callback-requests, Timeouts, Answer-rate, A... [Show Details](#)

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**Report Settings**

Select Time Period: Last month (February) | Limit Time Range:  Time Range | [Show Settings](#) | [View Report](#)

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**Report**

Details per queue [Add to Dashboard](#) [Download Report](#)

Customer: 10339 / Service number: 81511549 / Time Period: 01/02/2024 - 29/02/2024 / Generated: 02/03/2024 14:25:04 UTC+1

Queue	Incoming calls	Total calls	No. of hung up	No. of hung up within 2...	Call-back requests	Timed out	Exiting queue	Answered (excl call-...	Answered call-backs	Answer rate (%)	Avg. time in queue for...	Longest queue-tim...	A...
-	7	0	0	0	0	0	0	0	0	0%	00:00:00	00:00:00	00...
Sales	15	15	0	0	2	0	0	13	2	100%	00:00:04	00:00:06	00...
Support	12	12	0	0	0	0	0	12	0	100%	00:00:03	00:00:05	00...
Switchboard	19	19	1	1	0	0	0	18	0	95%	00:00:03	00:00:07	00...
<b>Total</b>	<b>53</b>	<b>46</b>	<b>1</b>	<b>1</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>43</b>	<b>2</b>	<b>98%</b>	<b>00:00:03</b>	<b>00:00:07</b>	<b>00...</b>

[Save as](#) [Cancel](#) [Save](#)

**From here you can:**

- click the *Full screen* icon (next to Download report) to maximise the report presentation
- change time period and click *View report*
- click *Show settings* to customise columns/rows included, re-arrange column order etc.
- add this report to a Dashboard
- download the report as a csv/xlsx file
- click *Save as* if you want to save this as a new custom report
- click *Save* if this is an existing custom report you want to update with the changes done

**Download report table as file**

When you have generated a report, you can select to download it. When you click *Download report*, the report's file name will be the "system name" for the report (e.g. QDetails) unless you change it, and the file type will be xlsx unless you change it to CSV.

## Report Settings

The screenshot shows a 'Download Report' modal window. The 'File Name' field contains 'Details'. The 'File Type' dropdown is set to 'XLSX'. The 'Include total row' checkbox is unchecked. The background shows a table with the following data:

	Call-back requests	Timed out	Exiting queue	Answered (excl call-...	Answered call-backs
	0	0	0	0	0
	0	0	0	1	0
	0	0	0	1	0
<b>Total</b>	4	2	0	0	0

If you want to include Total row(s) in the downloaded xlsx file, please tick *Include total row*.

A downloaded **XLSX** file will have the report data in the first sheet, and this sheet will have the Report's name, e.g. Details per queue. The Report parameters (customer number, service number, time period and generated time) will be shown in a separate sheet.

A downloaded **CSV** file will have the Report parameters (customer number, service number, time period and generated time) on row 1, the column headers on row 3 and data on rows 4-N, and not Total row.