Work with Genesys CX Insights Reports

Work with reports

8/29/2025

Contents

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  - Administrator
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Read and understand Genesys CX Insights reports, and learn how to drill, filter, or export report results.
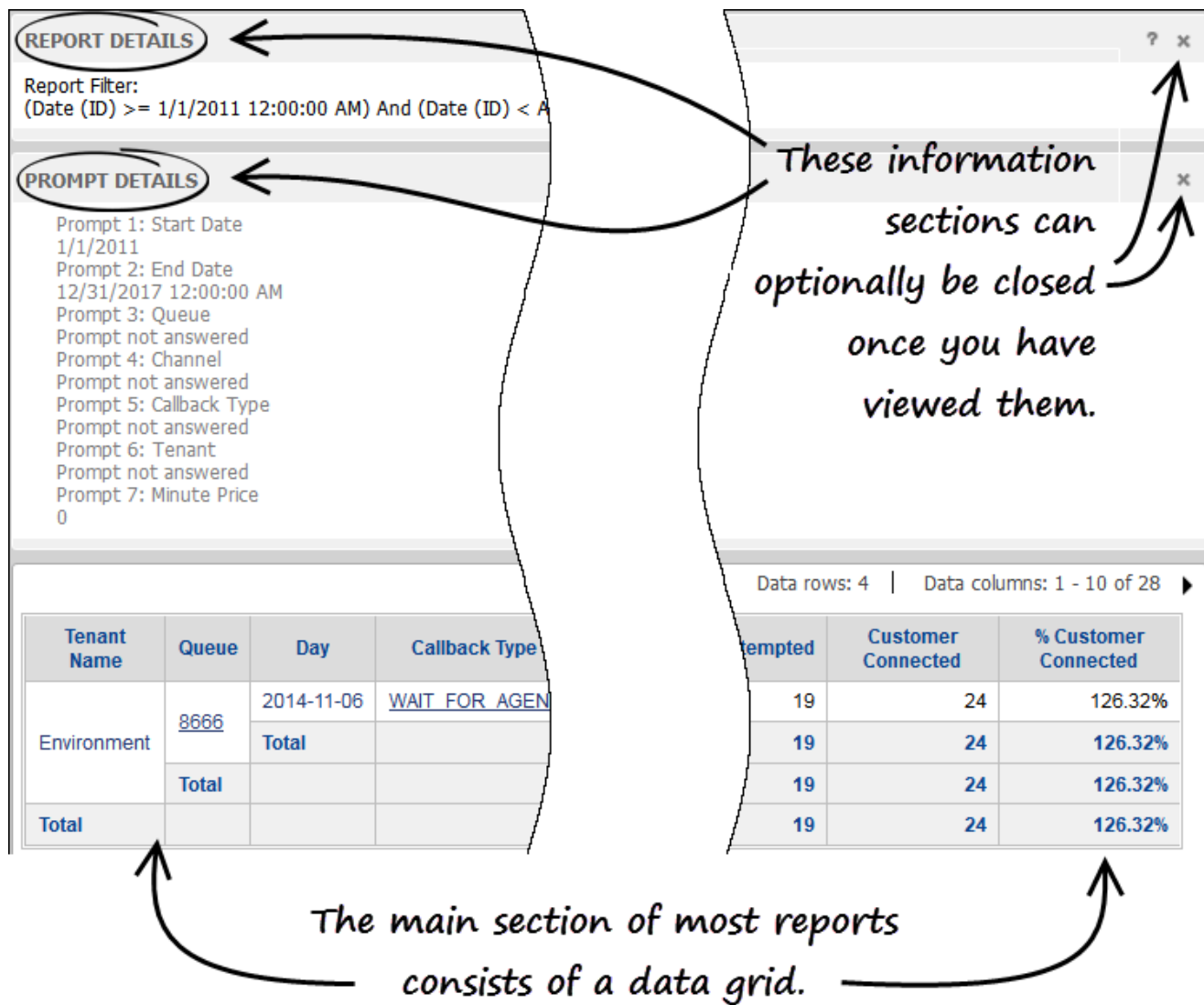
Related documentation:

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-
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RSS:

- For private edition

Anatomy of a report

REPORT DETAILS

Report Filter:
(Date (ID) >= 1/1/2011 12:00:00 AM) And (Date (ID) < A

PROMPT DETAILS

Prompt 1: Start Date
1/1/2011
Prompt 2: End Date
12/31/2017 12:00:00 AM
Prompt 3: Queue
Prompt not answered
Prompt 4: Channel
Prompt not answered
Prompt 5: Callback Type
Prompt not answered
Prompt 6: Tenant
Prompt not answered
Prompt 7: Minute Price
0

These information sections can optionally be closed once you have viewed them.

Data rows: 4 | Data columns: 1 - 10 of 28 ▶

Tenant Name	Queue	Day	Callback Type		tempted	Customer Connected	% Customer Connected
Environment	8666	2014-11-06	WAIT_FOR_AGEN		19	24	126.32%
		Total			19	24	126.32%
	Total				19	24	126.32%
Total					19	24	126.32%

The main section of most reports consists of a data grid.

Each report is divided into several sections (except for the main section of the report, each section is an 'editor'):

- **Report Details Editor** — provides information about the data in the report. You can optionally close this editor by clicking **x**.

- **Prompt Details Editor** — provides information about the prompt values used to run the report. You can optionally close this editor by clicking **x**.

- **The report grid** — Usually, reports consist of a simple grid, illustrating the selected data. Some prompt and metric names shown in reports are self-explanatory, but you can read more about them in the individual report descriptions (see the list of reports).

- Other editors appear if you open them, such as the **View Filter Editor**.

Understand the report grid

The main area of a typical report consists of a simple grid, optimized for on-screen viewing. However, you can easily print reports to PDF, XLS, or other formats. For reports with many columns or rows, many users find it easiest to use PDFs.

The first few columns of each report represent Attributes (also known as Dimensions). Attributes are values that divide up the data, and their impact is cumulative, from left-to-right. For example, in the Agent Utilization Report (shown here):

- the first column divides the data by Tenant Name,
- the second column subdivides the tenant data by Media Type,
- the third column subdivides the tenant/media data by Agent Name,
- the fourth column subdivides the individual agent data by Interaction Type,
- the fifth further breaks that down by Day.

Depending on your access role and the report you are viewing, you can work with reports in several ways. Some of the following topics are described in more detail further down the page:

- Sort—Right-click in a column, and choose an option from the **Sort** menu, to sort the table by the order of that column. Or, choose **Sort Grid** to sort the table by more than one column. Not all columns are sortable.

- Drill—Right-click in a column, and choose an option from the **Drill** menu, to drill up or down on the data in that column. For example, to change from viewing data for the Month, to viewing it for the Day, Hour, or even the Year. See Drilling in a report Not all columns can be drilled.

- Filter—Right-click in a column, and choose an option from the **Filter on** menu, to open the View Filter Editor, where you can select one or more conditions. See Filtering report data

- Some reports contain more columns than can usefully fit on screen at one time. You can page through the additional columns by clicking **>** (More Columns), or you can increase the maximum number of columns shown (**Tools > Report Options > Incremental Fetch**). On larger reports, it can also be

helpful to change the **Report Options > Headings > Lock** settings.

Video: Drill or filter historical reports in Genesys Multicloud CX

Link to video

This video describes how to read, drill, and filter historical reports in Genesys CX Insights.

Filtering report data

Construct filters in the View Filter Editor.

Use Filter On Selection to easily filter on any attribute.

After running a report, you can further filter the data that appears in the report. These filtering options let you make selections similar to the choices you made on the prompts page when you ran the report. You can add more than one filter on a report.

To filter a report, use either of the following to methods:

Creating a filter using the View Filter Editor

To construct a filter manually, open the View Filter Editor:

1. Open and run a report. For example, **Agents** > **Agent Utilization Report**.

2. Click **Tools** > **View Filter**.
   The View Filter Editor appears.

3. Click **Add Condition**.
   The **Filter On** list appears.

4. Click **Filter On**, and select a value on which to filter. For example, Agent Name will allow you to show only specified agent in the report.
   A list of Available agent data appears.

5. Double-click the name of each Agent to include (you can include one, several, or even all), and click **Apply**.
   You can add more than one filter on a report.

> ## Tip
> Some reports use metrics with the identifier (Fmt) in the metric name. This indicates that the value displayed is formatted to display in a more user-friendly fashion (HH:MM:SS), rather than in the units used by the underlying metric (which records a value in seconds). When you filter on such a value, you must indicate a value in seconds. So for example, to show only data with **Engage Time (Fmt) > 00:01:10**, filter **Engage Time 'greater than' 70**.

Filtering on selections

Use **Filter On** to build a filter more quickly.

1. Open and run a report. For example, **Agents** > **Agent Utilization Report**.

2. Right-click a value that you'd like to filter on (a value in one of the attribute columns, such as an agent name).

3. Click **Filter on Selections**.
   The View Filter Editor appears, where you can modify the filter as needed.

Drilling in a report

Agent Name	Interaction Type	Day	Offered	Accepted	Not Accepted	Responses	Avg Handle Time	Avg Engage Time	Avg Hold Time	W Ti
, A6001_sip (A6001_sip)	Internal	2011-04-11	9	9	0	9	00:01:30	00:01:28	00:00:14	0
		2011-04-13	2	2	0	2	00:03:06	00:03:06	00:00:00	
		2011-11-10	3	3	0	3	00:00:52	00:00:47	00:00:17	
	Total		14	14	0	14	00:01:35	00:01:33	00:00:16	
, A6002_sip (A6002_sip)	Internal	2011-04-11	10	10	0	10	00:01:05	00:00:53	00:00:24	0
		2011-04-13	2	2	0	2	00:03:06	00:01:40	00:01:26	00:
		2011-11-03	5	5	0	5	00:01:12	00:00:55	00:00:17	00:
		2011-11-08	8	8	0	8	00:01:03	00:00:43	00:00:20	00
		2011-11-10	3	3	0	3	00:00:52	00:00:42	00:00:16	
	Total		28	28	0	28	00:01:13	00:00:53	00:00:26	
		2011-04-11	8	6	2	6	00:00:52	00:00:45	00:00:07	
		2011-04-13	2	2			00:00:10	00:00:04	00:00:00	

Agent Name	Interaction Type					Not	Responses	Avg Handle Time	Avg Engage Time	Avg Hold Time	W Ti
, A6001_sip (A6001_sip)	Internal	201						:01:30	00:01:28	00:00:14	0
		201						:03:06	00:03:06	00:00:00	
		201						:00:52	00:00:47	00:00:17	
	Total					0	14	00:01:3	00:01:33	00:00:16	
, A6002_sip (A6002_sip)	Internal	201				0	10	00:01:05	00:00:53	00:00:24	0
		201				0	2	00:03:06	00:01:40	00:01:26	00:
		201				0	5	00:01:12	00:00:55	00:00:17	00:
		201				0	8	00:01:03	00:00:43	00:00:20	00
		201				0	3	00:00:52	00:00:42	00:00:16	
	Total					0	28	00:01:13	00:00:53	00:00:26	
		201					2	6	00:00:52	00:00:45	00:00:07
		201							00:00:10	00:00:04	00:00:00

Context menu overlay:
- Drill ▶
  - ↑ Month
  - ↓ Hour
  - More options...
- Sort ▶
- Sort Grid...
- Insert Metric ▶
- Move ▶
- Filter On...
- Keep on grid
- ✕ Remove from Grid
- ✕ Remove from Report
- Advanced formatting...
- Rename...
- Attribute Form

Agent Name	Interaction Type	Hour	Offered	Accepted	Not Accepted	Responses	Avg Handle Time	Avg Engage Time	Avg Hold Time	Av Wra Tim
, A6001_sip (A6001_sip)	Internal	2011-04-11 12	3	3	0	3	00:03:14	00:03:09	00:00:14	00:
		2011-04-11 13	6	6	0	6	00:00:38	00:00:38	00:00:00	
		2011-04-13 14	2	2	0	2	00:03:06	00:03:06	00:00:00	0
		2011-11-10 13	3	3	0	3	00:00:52	00:00:47	00:00:17	00:0
	Total		14	14	0	14	00:01:35	00:01:33	00:00:16	00:0
		2011-04-11 12	4	4	0	4	00:02:03	00:01:33	00:00:29	00
		2011-04-11 13	6	6	0	6	00:00:27	00:00:26	00:00:04	
		2011-04-13	2	2			00:03:06	00:01:40	00:01:26	0

You can *drill* on report data to see more detailed (or more general) information.

1. To drill on a report, first open and run the report.

2. Right-click a heading in the report; a context menu opens. If it is possible to drill on the metric on which you have clicked, **Drill** appears in the menu.
   The choices available vary depending on the type of data on which you click ('Drill down to Agent Name', 'Drill up to Month', 'Drill down to Interaction subtype', and so on). Not all data can be drilled, and in some reports, no data can be drilled. For example, right clicking the heading **Day** (in reports where that heading appears, such as **Agents** > **Agent Utilization Report**) gives you the option to drill to another time period, such as Month or Year. Note that arrows in the menu indicate whether a drill option is drilling 'Up' or drilling 'Down'.

3. Select one of the drill actions that appear. The report automatically updates to account for the change. Open the Drill menu again; note that the available options have now changed.

For more comprehensive drill options, click the **Data** menu, and select **Drill**. The **Drill Edito**r appears, where you can drill on multiple columns, and access advanced options.

Drill considerations

The ability to drill up or drill down within a report allows you to view results from a wider or narrower perspective, but it's important to understand the logic that Genesys CX Insights applies when you drill, as there are some cases where data can seem to disappear after you drill, or you see data that is not what you might expect.

Drilling occurs along the attribute hierarchies, for example, **up** from Agent to Agent Group, or **down** from Agent Group to Agent:

- Agent hierarchy: **Agent Group ←→ Agent Name**
- Campaign Group hierarchy:**Campaign Group ←→ Campaign**
- Interaction hierarchy: **Interaction Type ←→ Interaction Subtype**
- Service Type hierarchy: **Service Type ←→ Service Subtype**
- Time Interval hierarchy: **Year ←→ Quarter ←→ Month ←→ Day ←→ Hour ←→ 30 minutes**
- Queue hierarchy: **Queue Group ←→ Queue**

Unexpected results can occur in various situations, such as:

- When you run a report with date prompts for a specific sequence of days, and then drill up to a longer period of time, the report shows data for the entirety of the new period; however, this works only if the specific sequence of days includes the starting DATE_TIME_KEY for the time period to which you drill. Otherwise, the report can return no data. For example, if you initially run a report over the 1st - 5th of the month, and then drill up to the month level, the report takes in data from the rest of the month. However, if you run it over another five day period -- say the 5th - 10th, and then drill up, the report returns no data.

- When agent-campaign results display, drilling down from campaign to campaign group and then drilling up from agent to agent group can result in duplicate rows.

- Drilling down from aggregated results to the interaction- or interaction-segment level is not supported. (This is different from drilling along the Interaction hierarchy, which is based on interaction type and subtype (for example, `Inbound/InboundNew`), not on the legs of the interaction.)

Printing or exporting a report

Exporting a
report
to PDF
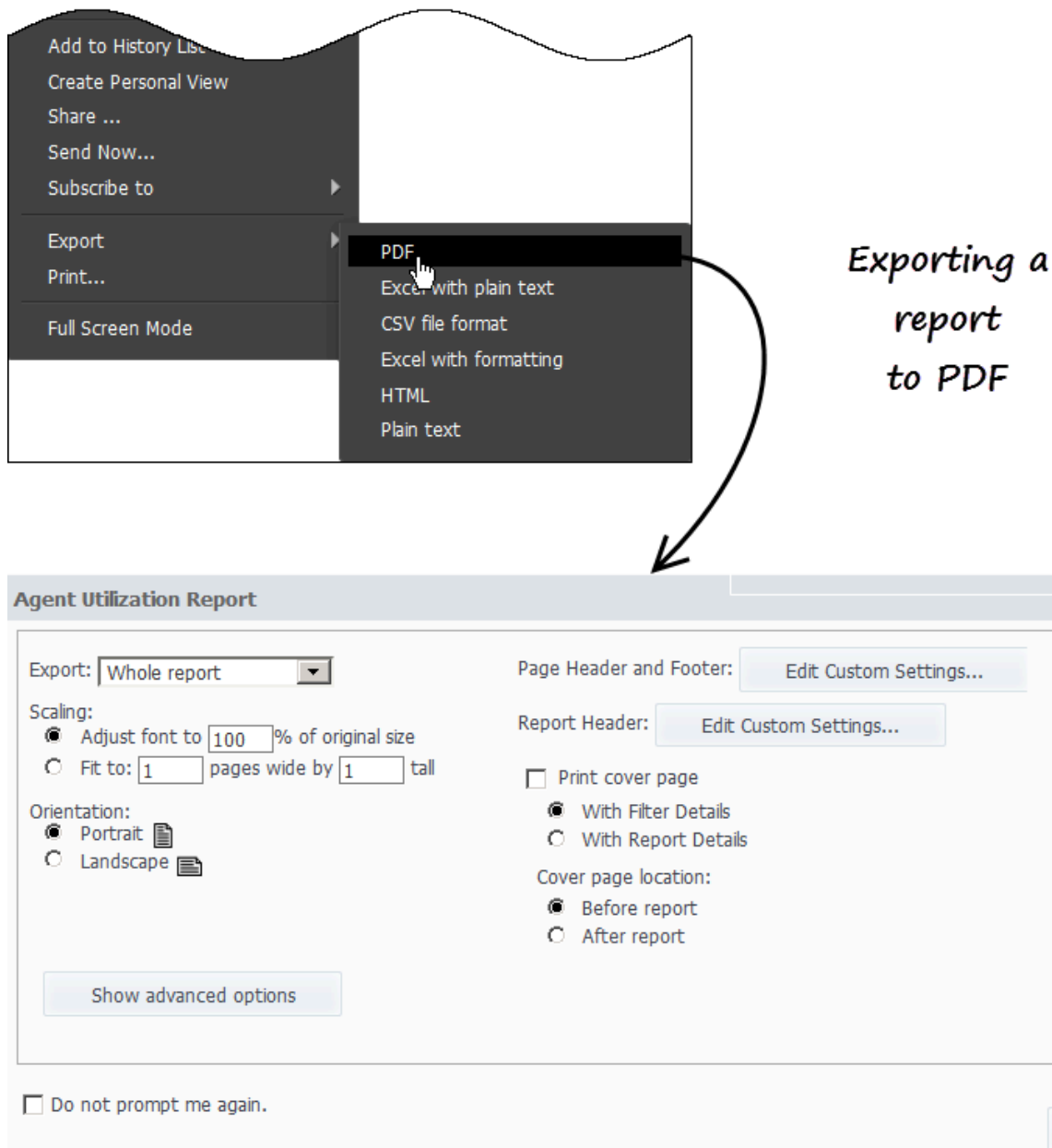
You can easily export your reports to various formats, including PDF (ideal for printing) or Excel/CSV (ideal if you want to take the data into other applications, manually edit the output, or what have you).

1. Click **Report Home** > **Export** > **PDF**.
       The **PDF options** page appears in a new browser tab.

2. Optionally, select options to control how GCXI exports the report, such as page size, orientation, or

other aspects of formatting. For many reports, it is a good idea to select **Fit to 1 Pages Wide** and **Landscape**.

3. Click **Export**. The PDF opens automatically in the browser tab. If you are happy with the output, you can click **Download** (to save the file) or **Print**.

Some users find it useful to export data to a spreadsheet format, as it is then possible to more easily sort and view the data, due to the larger working area available in a spreadsheet application, such as Microsoft Excel. This is often useful for reports containing a great deal of data, and for reports that can't easily fit in a browser window because they contain many columns or rows.
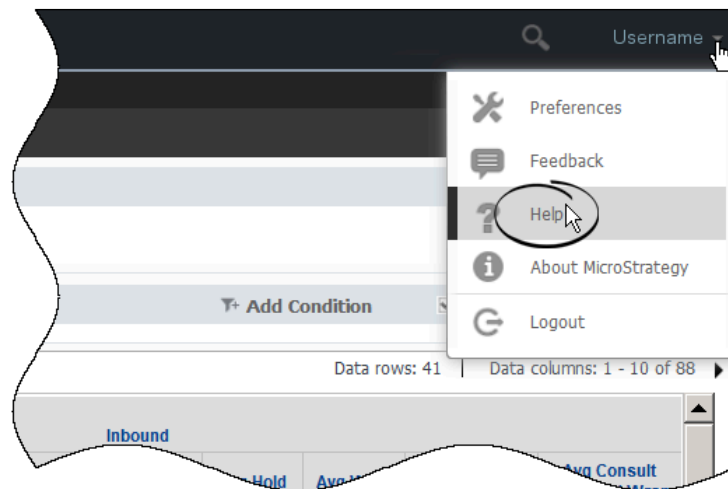
Video: Printing or exporting a report

Link to video

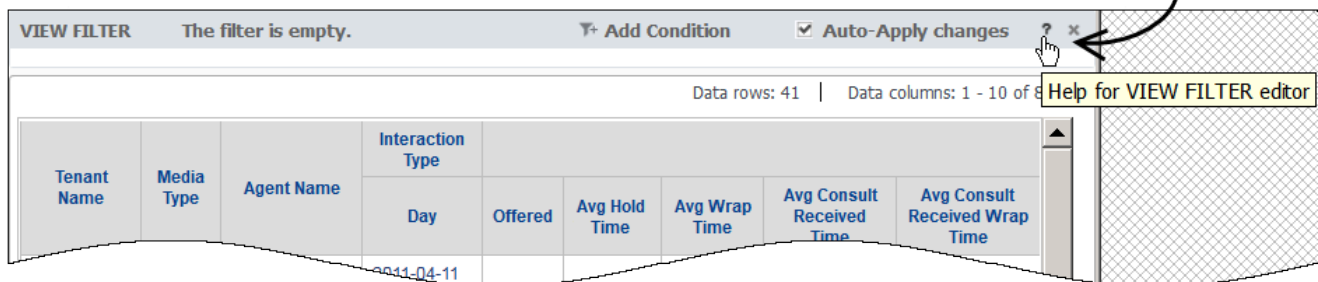This video describes how to print or export a report.

Learn more

Two ways to access MicroStrategy Help:

Select Help from the menu to access MicroStrategy user guides.

Click ? to access context-sensitive help.

In addition to Get started with Genesys CX Insights and other pages in this document, extensive MicroStrategy documentation is available. (MicroStrategy is the engine that drives Genesys CX Insights.)

- For context-sensitive help to explain the options you see on the Genesys CX Insights GUI, click the **?** next to the editor for which you want more information.

- For advanced users seeking detailed information, click the menu next to your user name, and click **Help** to access the latest online MicroStrategy documentation. Alternatively, go to the MicroStrategy Community Search Page and enter your search terms there.

Related Topics

- View a complete list of available reports.
- Learn how to generate historical reports.

- Learn how to read and understand reports.

- Learn how to create or customize reports.

To view more detailed information about the metrics and attributes used in the reports, and about other metrics and attributes that you can use to customize reports, see the *Genesys CX Insights Multicloud Projects Reference Guide*.