**REPORTING**

**Standard Report Types**

* **Catalog Null Search Results**: displays information on searches conducted by users when no results were found. The LMS will log any time a Catalog search returns results with zero matches.

Included in that record will be: the search term, the date and time of the search, whether the search was simple or advanced, what filters were used in an advanced search, the username, the user's group, which tab the user was on when they started the search. This allows administrators to look for trends on what their users are looking for but not finding.

* **Certification Exception**: contains information about learners who are in jeopardy of being out of compliance with a certification; can filter by selected custom fields, user's last name and username, learning plan name, due date, certification date and certification exception date.
* **Course Analysis**: contains course information and learners assigned to them; can filter by score, username, user status, course name, course type, class name, completion date and status.
* **Instructor Information**: contains instructor and class data; can filter by instructor last name, instructor user name, course name and course type.
* **Learner Transcripts**: contains learner course information, can filter by score, user last name, user name, user status, completion status and date and course type.
* **Learning Plan Details**: Contains detailed information about learning plans; Designed to show what a plan contains, and which users have completed which activities in a plan; This report is not meant to summarize individual course completions for a Learner but instead provide an overall picture of what is happening with a learning plan; Can be filtered by learning plan name and assignment status, learner information (name, username, status).

Note: This report only tracks progress for a user while they are assigned to the plan. If their assignment is removed, their progress is frozen at that time.

* **Learning Plan Overview**: Contains learning plan information; Designed to show due dates and expiration dates as well as percentage of completion per learner; Can be filtered by learning plan name and assignment status, learner information (name, username, status), assignment date, due date, and last completion date. Note: This report only tracks progress for a user while they are assigned to the plan. If their assignment is removed, their progress is frozen at that time.
* **Learning Plan Information**: Contains details about what a learning plan contains and when the contents were created; Can be filtered by learning plan name, course name and code, course type, and class name.
* **Online Resources**: allows a user with permissions to view information regarding which online resources have been accessed, by whom and when.
* **User Usage Summary**: contains information about user logins; can filter by number of courses registered or completed, login count (total successful logins for the user regardless of any date filtering), last login date (date and time of last successful login specified in GMT), user first name, user last name, user name, user status. Can also filter to show only users that have or have not logged in at all.

Note!The time that a user has spent in a SCORM or AICC course is not currently available to include on a report. The SCORM engine tracks the information but the LMS does not yet display it because the information is not yet stored in the LMS database.

**Managing Standard Reports**

Standard reports refer to reports that are predefined and ship with the LMS. They are typical for what administrators and instructors need to know about the status of training in their organization.

**To Access a Standard Report**

1. Navigate to System Reports.

2. Click the **Standard Reports** button.

3. On the All Standard Reports tab, select the report that you want to filter and run.

4. Click the **Filter and Run** button.

**Filtering a Report**

Use the filters specified within the report to narrow your resulting data. The manner in which you filter data will vary from one report to another depending on the type of fields available.

**Types of Filters**

1. **Completion Date**: specify the start and end dates for the field using the text boxes or calendar icons.
2. **Group Name**: specify which group(s) you want to filter on by choosing them from the **Available** list and clicking **Add** button to move them to the **Selected** list.
3. **Course Type**: specify which fields you want to include in your filter by choosing them from the **Available** list and clicking **Add** button to move them to the **Selected** list.
4. **Text**: use the drop-down to select the criteria that you want to apply to the text you enter into the accompanying text box. Choose from the following options:

• **Contains**: results returned will contain the value entered.

• **Ends With**: results returned will end with the value entered.

• **Equals**: results returned will equal exactly the value entered.

• **In:** results returned will contain the value entered.

• **Starts With**: results will begin with the value entered.

5. **Completion Status**: specify which fields you want to include in your filter by choosing them from the **Available** list and clicking **Add** button to move them to the **Selected** list.

**To Run a Standard Report**

The results of the report you have chosen to run will be displayed in a paginated view within the main workspace. From here, you can review the results, toggle the report view from compact to expanded, export it to another application, and print it.

1. Access the standard report that you want to filter and run.

2. Specify the filters that you want to use in this report.

3. Click the **Run** button.

4. From each of the filters, select the options for your desired report.

5. Click the **Run** button.

**Exporting a Report**

You can export a report to another application in a few easy steps. You can specify particular formatting for your exported file by selecting a file format and clicking the **Settings** button.

**To Export a Standard or Custom Report**

1. Navigate to **Reporting**.

2. Click **Standard Reports**.

3. Filter and run the desired report.

4. Review the content to make sure that it is what you want to export.

5. Click the **Export** button in the upper right corner of the workspace.

6. From the **Export Report** option group, choose the desired format from the following:

• CSV

• PDF

• HTM

• RTF

• TXT

• XLS (MS Excel)

• XML

• ODT

7. Click the **Export** button and follow your computer's on-screen instructions to save and open the exported file.

**Best Practice!** Depending upon the amount of data in a report, Excel will not be able to export all of the rows. We recommend exporting into a .CSV format which will use Excel to render the data.

**Creating a Custom Report**

The wizard provides you with an intuitive method to create a custom report. Each report focus area includes fields that are specific to data that will be useful on that kind of report. For the sake of reporting accuracy, not all fields are available in all focus areas.

**To Create a Custom Report**

1. Navigate to **Reporting**.

2. Click the **Custom Reports** button.

3. Click the **Create New Report** button.

4. From the **Select Report Type** drop-down, select the type of report that you want to create. The **Data Dictionary** button allows you to display in a second browser window a list of the fields associated with the chosen report type.

5. Click **Begin**.

6. In the **Name and Description** section, enter a name and description for this custom report.

a. In the **Name** text box, enter a name for this custom report.

b. In the **Description** text box, enter a description for this custom report. Keep in mind that descriptions help you to distinguish one report from another.

c. Click **Next**.

7. In the **Select Data** section, choose the fields that you want to include in the report.

a. From the **Available Data** list box, select the field(s) you want to include.

b. Click the **Add** button to move the selected field(s) to the Selected Data list box.

c. Click **Next**.

8. In the **Set Sort Order** section, use the arrow buttons to specify the order in which you want the fields to appear on the report.

a. Fields at the top of the list will be displayed on the left of the report while fields at the bottom will be displayed on the right.

b. Click **Next**.

9. In the **Select Filters** section, choose, from a list of available standard fields, the filters that you want to use in the report.

a. From the **Available Filters** list box, select the filter(s) you want to include.

b. Click the **Add** button to move the selected filter(s) to the Selected Filters list box.

c. Click **Next**.

10. In the **Choose Filters** section, specify, from a list of custom fields, the additional filters that you want to use in the report.

a. Click **Next**.

11. The **Confirm Your Decisions** screen allows you to double-check your selections before you proceed. Click **Previous** to make changes before saving. Click **Save** to continue. Once you save your changes, you are prompted to choose your next action.

**Managing My Custom Reports**

The My Custom Reports tab allows you to see a list of all the custom reports that you have

created. Users cannot see custom reports created by other users unless the report has been

shared. From here, you can run, edit, filter, share and archive a custom report by using the

buttons at the bottom of the screen.

**Editing the Name, Description and Status of a Custom Report**

The details of the report are visible from this page. You can edit the details for custom reports that you create. You can also run and archive the report from this page.

1. Navigate to **Reporting**.
2. Access the item you want to modify.
3. In the **Name** text box, enter the name of the report. This should identify it among the other reports you create.
4. In the **Description** text box, enter a description for the report. This should be brief yet descriptive enough to identify the report for yourself as well as for anyone with whom you share the report.
5. **Status**: Select an appropriate status.
6. Click **Update**.

**Editing the Selected Data for a Custom Report**

Visible from this page are the data that has been selected to appear on the report. You can add and remove fields. You can also run and archive the report from this page.

1. From the **Available Data** list box, select the field(s) that you want to appear as columns on the report.
2. Use the **Add** and **Remove** buttons in the center to move fields between the Available Data to the Selected Data list boxes.
3. Click **Update**.

**Editing the Sort Order for a Custom Report**

The **Sort Order** tab allows you to see the order in which the fields will appear as columns on the report. You can shuffle the fields up and down using the arrow buttons. You can also run and archive the report from this page.

1. Within the **Columns Order** list box, select the desired field name and use the arrow buttons to the right of the box to move that field name up and down within the list.

2. Click **Update**.

**Managing My Custom Reports**

The My Custom Reports tab allows you to see a list of all the custom reports that you have created. Users cannot see custom reports created by other users unless the report has been shared. From here, you can run, edit, filter, share and archive a custom report by using the buttons at the bottom of the screen.

**Editing the Filters for a Report**

The **Filters** tab allows you to see the order in which the fields will appear as columns on the report. You can shuffle the fields up and down using the arrow buttons. You can also run and archive the report from this page.

1. Navigate to **Reporting**.
2. Access the item you want to modify.
3. In the Custom Field Filters section, specify the custom fields that you want to use as filters for the report.

a. From the **Available Custom Fields** list box, select the field(s) that you want to appear as filters for the report.

b. Use the **Add** and **Remove** buttons in the center to move fields between the Available Custom Fields to the Selected Custom Fields list boxes. The page will refresh to display individual filtering options for each of the selected fields.

1. In the individual filters section, specify how you want to filter each of the selected fields.

5. Click **Update**.

**Sharing a Custom Report**

The wizard provides you with an intuitive method to share a custom report that you have created with another user, an entire user group or all members of a particular role.

**Starting the Share Custom Report Wizard**

1. Navigate to **Reporting**.
2. Access the desired custom report.
3. Click the **Share Report** button.
4. In the **Share Custom report** section, click the radio button for the option that best fits how you want to share this report.
	1. Share with one or more individual users.
	2. Share with one or more user groups.
	3. Share with one or more user roles.
	4. Share with users, groups and roles.
5. Click **Begin**.
6. Follow the steps below based on the criteria you selected above.

**To Share a Custom Report with Individual Users**

1. In the **Select Users** section, search for and select the user(s) with whom you want to share this report. You can use the Bucket feature to hold users while you conduct a compound search.
	1. In the **Select** column, check the box(es) for the user(s) you want to select.
	2. Click **Next**.
2. The **Confirm Your Decisions** screen allows you to double-check your selections before you proceed. Click **Previous** to make changes before saving. Click **Save** to continue. Once you save your changes, you are prompted to choose your next action.

**To Share a Custom Report with User Groups**

1. In the **Select Groups** section, select the group(s) with whom you want to share this report.
2. Click **Next**.
3. The **Confirm Your Decisions** screen allows you to double-check your selections before you proceed. Click **Previous** to make changes before saving. Click **Save** to continue. Once you save your changes, you are prompted to choose your next action.

**To Share a Custom Report with User Roles**

1. In the **Select Roles** section, select the role(s) with whom you want to share this report.
	1. In the **Select** column, check the box(es) for the role(s) you want to select.
	2. Click **Next**.
2. The **Confirm Your Decisions** screen allows you to double-check your selections before you proceed. Click **Previous** to make changes before saving. Click **Save** to continue. Once you save your changes, you are prompted to choose your next action.

**To Share a Custom Report with Individual Users, Groups and Roles**

1. In the **Select Users** section, select the User Table and Users By Group tabs to search for and select the user(s) with whom you want to share this report. You can use the Bucket feature to hold users while you conduct a compound search.
	1. In the **Select** column, check the box(es) for the user(s) you want to select.
	2. Click **Next**.
2. In the **Select Groups** section, select the group(s) with whom you want to share this report. Click **Next**.
3. In the **Select Roles** section, select the role(s) with whom you want to share this report.
	1. In the **Select** column, check the box(es) for the role(s) you want to select.
	2. Click **Next**.
4. The **Confirm Your Decisions** screen allows you to double-check your selections before you proceed. Click **Previous** to make changes before saving. Click **Save** to continue. Once you save your changes, you are prompted to choose your next action.