

Ad-hoc (Custom) Reports – An Example

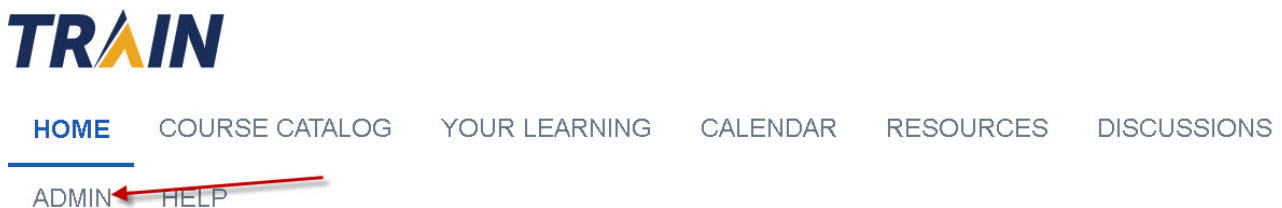
The Ad-hoc (Custom) Reports functionality in TRAIN allows administrators to develop customized reports on a variety of TRAIN data fields.

This example will demonstrate how to create an ad-hoc (custom) report that provides information about course completions across a set of courses.

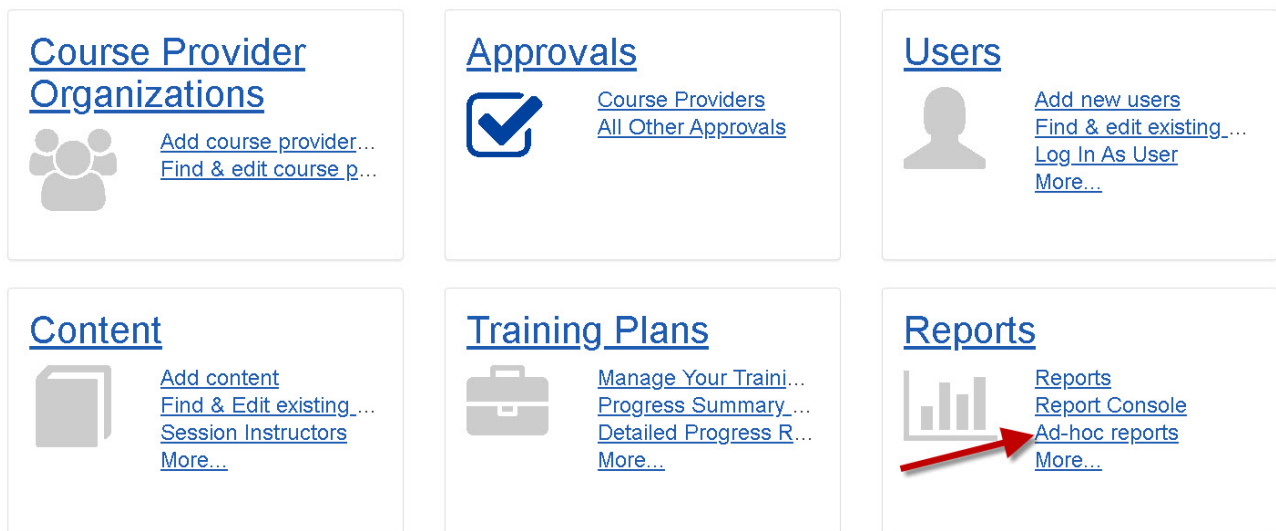
How do I create a report?

The Ad-hoc (Custom) Reports functionality is available within the admin menu. Access to this functionality is provided through the “Report Manager” role at the group level.

1. Select the **Admin** option from the navigation bar.






2. Select the **Ad-hoc reports** option from the Reports menu tile















3. Select the **Add** button at the bottom left of the reports table. If this is your first time accessing the reports table, your list of reports will be empty.

Ad-hoc Reports
This module provides the ability to design simple, custom reports to the specifications you require.


Tip: To clone an existing report for use as a template, please click  button
Tip: To design report, click on  button
Tip: To edit report, click on  button
Tip: To view report, click on the name of report.

Show : ☒ My reports only ☐ All reports ☒ Only Active reports

Actions	Report Name	Description
   	Courses Completed [by Date Range]	
   	Number of active users per	Used to track activity level of units.
   	Number of active users per within date range	Number of active users per within date range.

20 rows per page Filter * A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All


Displaying page 1 of 1, items from 1 to 3 of 3

Add 

4. Enter a **Report Title**.

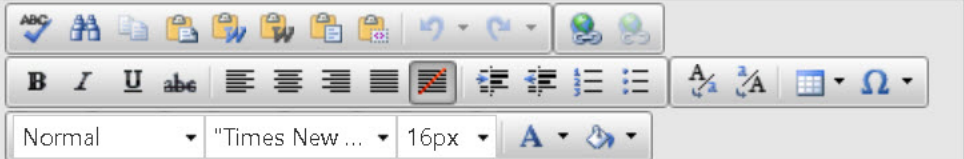
Edit AdHoc Report

Attributes **Visibility**



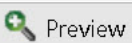
Report name: * 


Active: ☐

Description:


Normal "Times New ... 16px A

5. Select the **Design** button to build your report.

   Words: 0 Characters: 0

Save **Back** **Design** 

6. Select the **Course Registrations** data table and **Next** to proceed.

Report Designer
Data Tables

☒ Course Registrations
☐ Courses
☐ Users

Next **Cancel**

7. In the Design view, select the Report Fields that you would like the report to display and Report Parameters that you would like the report to use to determine what data to display.

Attributes Data Restriction By Group

Tip: - add field to report.
Tip: - add field to report parameters.

Available Tables/Fields:

- Course Registrations
 - Active
 - Approval Date
 - Approved By
 - Certificate Type
 - Completed Date
 - Course Completed
 - Course Grade (Percent)
 - Course Grade (Points)
 - Course ID
 - Course Registration ID

Report Fields

Tip: Drag and drop records to change field order.
Note: All times are listed in (GMT-05:00) Eastern Time (US & Canada).

Field Name	Title	Width (inches)	Align-ment	Group Rows By	Allow Sorting	Aggr. Type	Total Aggr. Type	Show	Order
No records to display.									

Report Parameters

Tip: To edit report parameter properties, click on the pencil button.

☒ AND ☐ OR ☐ Advanced



Field Name	Operator	Value
No records to display.		

The component icon will select this data field as a **Report Field**

The funnel icon will select this data field as a **Report Parameter**

8. For each **Report Parameter**, you will be prompted to select the **Operator** and **Value**. In the example below, Active Course Registrations = TRUE. Select the **Green Checkmark** to save.

- Report parameters are the data fields being used to filter the dataset. By entering a report parameter, TRAIN will only return results that meet that filter. In the example used here, all data that does not meet the Active Course Registrations = TRUE filter (report parameter) is excluded from the results.
- Other operators include \leq , $<$, \geq , $>$, \neq (does not equal), LIKE, and BETWEEN.
- Other values may include open text fields and dates.
- The **Ask value during execution** option allows you to select which value you are looking for when you run the report, allowing you to easily change dates or open text values for maximum report flexibility.












Field Name	Operator	Value
  Course Registrations / Active	=	<input type="checkbox"/> Ask value during execution True

9. Select the funnel icon to add the **Course ID** selection to the Report Parameters.

- You can enter the Course ID here or select Ask value during execution to enter the Course ID when you run the report.
- If you wish to report on users who completed multiple courses, you can select the funnel icon multiple times next to Course ID from the Report Fields.

Field Name	Operator	Value
  Course Registrations / Active	=	True
  Course Registrations / Course ID	=	1091302
  Course Registrations / Course ID	=	<input checked="" type="checkbox"/> Ask value during execution

10. Select the funnel icon to add the Completed Date selection to the Report Parameters. Use the BETWEEN operator to allow you to select a date range.
 - a. You can select Ask value during execution to enter dates when you run the report.
 - b. Note: All dates without a time use 12:00:00 AM. Therefore, if you would like to run data for a full month, you will want to use (for example) 09/01/2020 and 10/01/2020.

Field Name	Operator	Value
  Course Registrations / Active	=	True
  Course Registrations / Course ID	=	1091302
  Course Registrations / Course ID	=	<input checked="" type="checkbox"/> Ask value during execution
  Course Registrations / Completed Date	BETWEEN 	<input type="checkbox"/> Ask value during execution <input type="text"/>  and <input type="text"/> 

11. For each **Report Field**, you will have several options, outlined below. In the example below, User ID, Course ID, and Course Title were selected; you may need to select data that includes identifying information, such as First Name, Last Name, and Email. Select the **Green Checkmark** to save each row.
 - a. Report Fields are the data fields that will be displayed in the report, based on the Report Parameters that you are filtering the dataset by. In this example, TRAIN will display the User ID, Course ID, and Course Title for each registration that meets the Report Parameters above.
 - b. Group Rows by will group all alike rows together by this field.
 - c. Aggr. Type (Aggregation Type) will count the number of fields, instead of displaying each field.
 - d. Total Aggr. Type (Total Aggregation Type) will both display each field and provide a count at the end.
 - e. Order will allow a change in the display order of the fields.
 - f. Note: User fields will be found by expanding the + icon next to the Users section of the Report Fields.

Field Name	Title	Width (inches)	Align-ment	Group Rows By	Allow Sorting	Aggr. Type	Total Aggr. Type	Show
Course Registrations / Users / User ID	User ID		Left	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None	None	<input checked="" type="checkbox"/>
Course Registrations / Course ID	Course ID		Left	<input type="checkbox"/>	<input checked="" type="checkbox"/>	None	None	<input checked="" type="checkbox"/>
Course Registrations / Courses / Course Title	Course Title	<input type="text"/>	Left	<input type="checkbox"/>	<input checked="" type="checkbox"/>	None	None	<input checked="" type="checkbox"/>

12. The **Data Restriction by Group** tab will allow you to select which groups your data should reflect. Select the + icon to expand the grouping structure view.
 - a. If you have access to subgroups, you can select any group.

Attributes

Data Restriction By Group

☒ All Group Assignments
 ☐ Primary Group Designation Only
 ☐ Secondary Group Designation Only

☐ Medical Reserve Corps (MRC)

☐ Course Provider

☐ DCVMRC

☐ MRC Deployment

☐ MRC Test Region

☒ Region 01 (I)

☐ Region 02 (II)

☐ Region 03 (III)

13. Select **Save** to complete creating the report. You can edit the report at any time.
14. You will be asked if you would like to make the report **Active**. Select **Yes** and then **Save**.

How do I run a report?

1. Select the **Admin** option from the navigation bar.
2. Select the **Ad-hoc reports** option from the Reports menu tile
3. To run the report, click on the **Report's Title**



Actions	Report Name
	****This is the report title


Click on Title Here

4. If you used the **Ask value during execution** option, you will first need to complete those fields. In the example below, the Course ID and BETWEEN dates are required.
- Once you fill in the required fields, select **Execute Report** to generate the data.
 - Note: All dates without a time use 12:00:00 AM. Therefore, if you would like to run data for a full month, you will want to use (for example) 09/01/2020 and 10/01/2020.

Report Parameters

Course Registrations / Course ID =

Course Registrations / Completed Date BETWEEN  and 



5. An example of an executed report is below.
- The fields entered during execution can be updated at any time and a new report generated by selecting Execute Report.
 - The report data can be exported by selecting the blue **disk icon**. The most popular export formats are CSV and Excel.

Report Parameters

These report parameters can be changed at any time

Course Registrations / Course ID = 1091302

Course Registrations / Completed Date BETWEEN 9/1/2020 and 10/1/2020

Execute report

1 of 1 Find | Next

Report has been generated by MRC Admin on 11/18/2020

***This is the report title

Course Registrations / Active = True
AND
Course Registrations / Course ID = 1091302
AND
Course Registrations / Course ID = 1091302
AND
Course Registrations / Completed Date BETWEEN 9/1/2020 AND 10/1/2020

These are the
full report
parameters

Export report
data here

XML file with report data
CSV (comma delimited)
PDF
MHTML (web archive)
Excel
TIFF file
Word

User ID	Course ID	Course Title
565069	1091302	Making Contact: A Training for COVID-19 Contact Tracers
872714	1091302	Making Contact: A Training for COVID-19 Contact Tracers
1205700	1091302	Making Contact: A Training for COVID-19 Contact Tracers

This is the report
data