

Custom Reporting

Purpose:

This user guide explains how to view, edit, and create **custom reports**. This is an advanced reporting tool where proficiency in SQL (Structured Query Language) and/or report generation may be helpful.

You can use 3 data sets to build your report:

1. **Course Registrations**
2. **Courses**
3. **Users**

Administrative Roles with Access:

- **Report Manager**

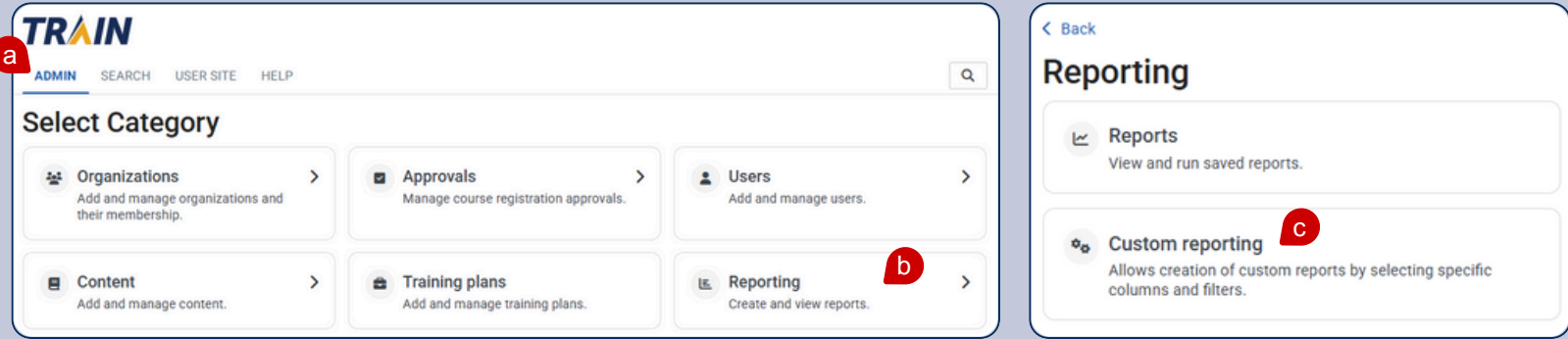
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1

Navigate to Custom Reports

Go to the (a) **Admin** menu. Click on the (b) **Reporting** tile. Then, select the (c) **Custom Reporting** tile.



2

View, Edit, and Manage Custom Reports

On the Custom Reporting page, you can view (a) your reports and (b) reports that have been shared with you. You can (c) Search for specific reports by name or description. You can also open, edit, or delete your report under the (d) three-dot menu. Click the (e) report name to view the report details.



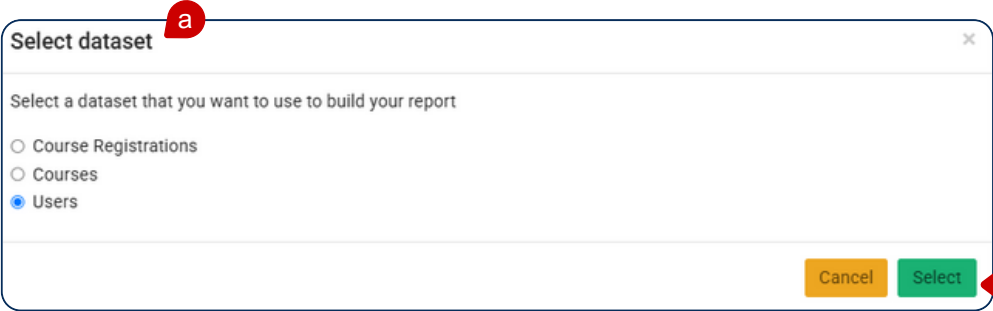
3

Add a New Custom Report

Click the **Add a new report** button to open the custom report creation interface.

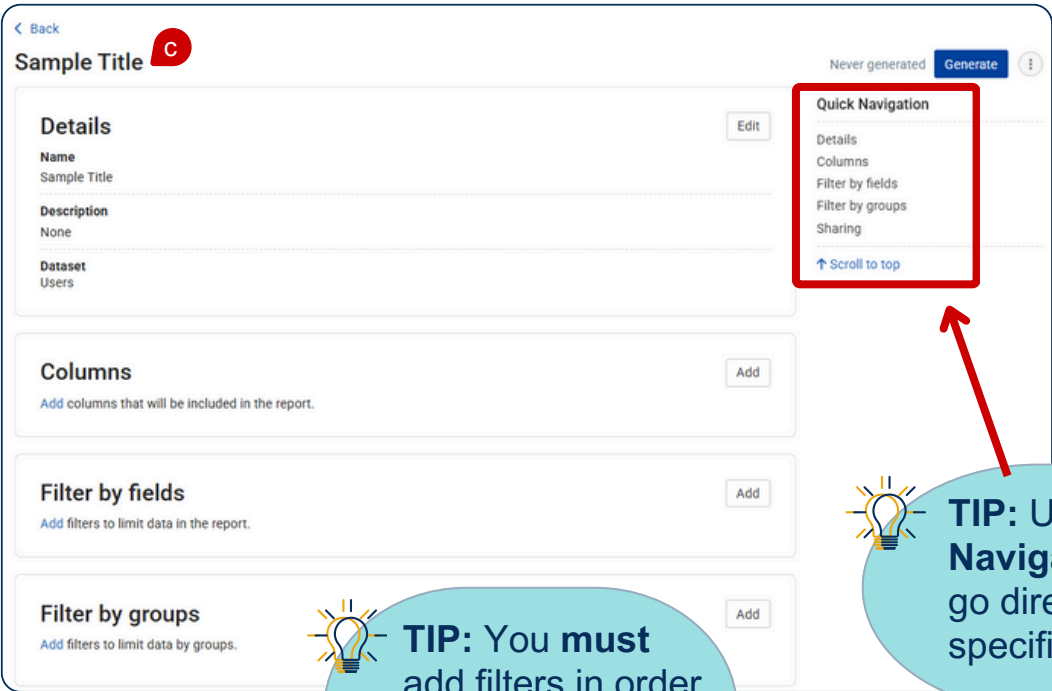
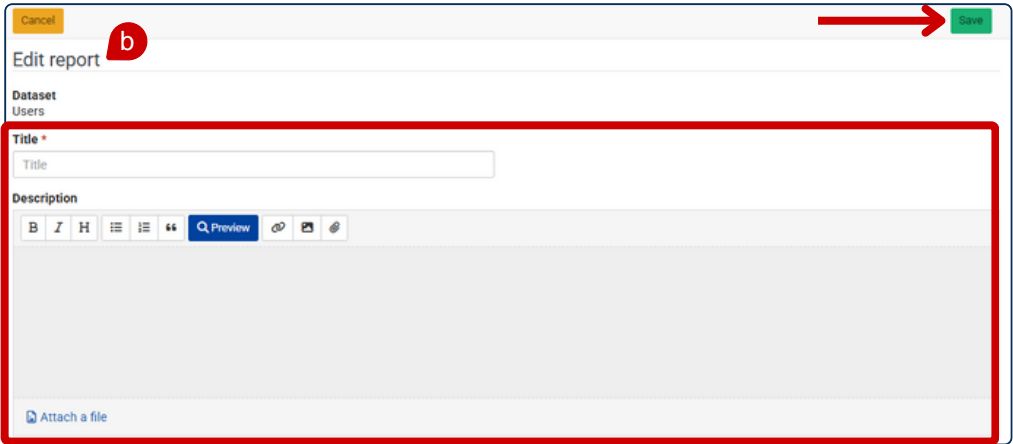


These reports are highly customizable, but there are general steps to follow as you build them.




(a) **Select dataset:**
Choose whether you want to build your report on course registrations, courses, or users. Click the green **Select** button.

(b) **Edit Report:**
Give your report a **Title** and **Description**. Use keywords to help your report appear in searches. Click the green **Save** button.



(c) **Report Details Page:**
Here, you can edit report details, add columns, add filters, add groups, and manage report sharing settings. View **Steps 5-8** for more information.

 **TIP:** You must add filters in order to generate a report.

 **TIP:** Use the **Quick Navigation Panel** to go directly to a specific report setting.

5

Add Columns to Report

Click the **Add** button to add columns to your custom report. You can only add one column at a time.

Columns

Add columns that will be included in the report.

Add

>> To select a field for a column, click on the data point you want to include in your report. Then, click the green **Select** button.

Select field

Select a field for the column

Users

Active

Address 1

Address 2

Bureau/Section

City

Country

County

Course Provider Approval Status

Course Provider ID

Course Provider State

Date Created ✓

Department

Email

Evening Phone

Extension

Cancel

Select

>> Edit attributes related to the column. Remember to click the green **Save** button.

Edit column

Field name

Users / Date Created

Title*

Date Created

☒ Show column in report

Aggregation

Summarize data by grouping rows and performing calculations like sum, average, count, minimum, or maximum on each group. For example, in a database of products, you might want to calculate the average price of the whole inventory.

☒ No aggregation

☐ Group by

Groups rows that have the same values into summary rows.

☐ Aggregation function

An aggregate function is a function that performs a calculation on a set of values, and returns a single value.

None

Cancel

Save

- (a) **Edit Title:** You have the option to edit the column title. This is what will show when you download the report.
- (b) **Show column in report:** When checked, this column will appear in the report for you and those with whom you've share it. When unchecked, the column will not be visible in the report.
- (c) **Aggregation:** You have several options to summarize data by grouping rows and performing calculations like sum, average, count, minimum, or maximum on each group. View descriptions below:

No Aggregation - Selecting this option means that data in this column will not be grouped or sorted.

Group By - Selecting this option means that rows with the same value in your report will be sorted into summary rows.

Aggregate Function - Selecting this option allows for more complex calculations on a set of values to return a single value. Different fields will have different aggregation options, such as **sum**, **count**, **average**, **minimum**, or **maximum**.

Add Columns to Report (continued)

5

Once you’ve saved your column selections, you can click the **(d)** three-dot menu to **edit**, **move** the columns up and down to change the order they appear in the report, or **delete** the columns.

Columns

Add

Field name	Title	Group by	Aggregate function	Show
Users / User ID	User ID	No	None	Yes d
Users / City	City	No	None	Edit
Users / Country	Country	No	None	Move up
Users / First Name	First Name	No	None	Move down
Users / Last Name	Last Name	No	None	Delete

6 Filter Report by Fields

Click the **Add** button to add filters to limit data in the report.

Filter by fields

Add filters to limit data in the report.

Add

>> To select a field for a column, click on the data point you want to include in your report. Then, click the green **Select** button.

Select field

Select a field for the filter

Users

Active

Address 1

Address 2

Bureau/Section

City

Country

County

Course Provider Approval Status

Course Provider ID

Course Provider State

Date Created ✓

Department

Email

Evening Phone

Cancel

Select

>> Edit conditions for report filters. Remember to click the green **Save** button.

Cancel

Save

Edit report filter

Field name

Users / Date Created

a

Operator *

Choose an operator

Value

Value to compare

MM/DD/YYYY

Ask value during execution

(a) Operator: An operator is a sign, symbol, word, or phrase that specifies the type of comparison the report will make. View descriptions below and onto **page 6**.

= equal value

> greater than

!= not greater than

>= greater than or equal to

Below is a continuation of various operator descriptions that enhance custom reporting options.

< less than

<= less than or equal to

BETWEEN - greater than or equal to the minimum value and less than or equal to the maximum value

HAS VALUE - value included

HAS NO VALUE - value not included

LIKE - searches for a specified pattern within a column

Wildcard	Description	Example
%	Matches any number of characters (including 0)	Jo% matches John, Jonas, Jordan
_	Matches exactly one character	J_n matches Jan, Jon, but not John
[]	Matches any single character within the brackets	J[ao]n matches Jan, Job, but not Jen
[^]	Excludes characters within the brackets	J[^ao]n matches Jen, but not Jan or Jon
-	Defines a range of characters	J[a-z]n matches Jan, Jen, Jon

- >> **Value:** You can input a (b) predetermined value that will remain the same every time you run the report, or you can opt to have the system (c) ask you the value to compare every time you run the report.
- >> **Filter condition:** Click the (d) **Edit** button to select filter conditions. You can select to match all (AND condition) or match any (OR condition).
- >> Remember to click the (e) **Save** button.

Value

☒ Value to compare (b)

MM/DD/YYYY

☐ Ask value during execution (c)

Filter condition

Match all (AND condition)

Edit (d)

Edit filter condition

☒ Match all (AND condition)

☐ Match any (OR condition)

☐ Advanced

Cancel

Save (e)

7

Filter Report by Groups

Click the **Add** button to select specific groups that can access your report.

Filter by groups

Add filters to limit data by groups.

Add

Select Group

Search by any part of group name or by group ID

National

National/ International

National/ International/Afghanistan

National/ International/Albania

National/ International/Algeria

National/ International/Andorra

CancelApply

Type keywords or group ID numbers into the search bar to narrow group selection options.

Click the green **plus (+)** button next to the group you want to have access to your report, then click the green **Apply** button.

8

Manage Report Sharing Settings

Sharing

Not shared with other admins, you can add groups to share with.

Add

>> Note that by default, your report is not shared with anyone.

Click the **Add** button to select groups with which you'd like to share your report.

Select Group

Illinois

National/Illinois

National/Illinois/Lee

National/Illinois/Bond

National/Illinois/Cass

National/Illinois/Clay

National/Illinois/Cook

National/Illinois/Ford

National/Illinois/Kane

National/Illinois/Knox

National/Illinois/Lake

1 2 3 4 5 6 7 8 9 10

CancelApply

Type keywords or group ID numbers into the search bar to narrow group selection options.

Click the green **plus (+)** button next to the group you want to have access to your report, then click the green **Apply** button.

9

Generate and Download the Report

After saving your report and its data selections, generate and download your report.

- (a) If you need to make changes to your report, click the **Edit** button.
- (b) Click the **Generate** button to prepare your report to download.
- (c) The Generate button will turn into a blue **Download** button once your report is ready. Click the button to download a copy of the report to your computer. Custom Reports download as a **.xlsx spreadsheet**.
- (d) Click the three-dot action menu to view more report actions available to you. These include Download, Generate, Edit, and Delete.

TRAIN

ADMIN SEARCH USER SITE HELP

< Back

User Report Sample

Never generated **Generate** ⋮

Details

Name

User Report Sample

Description

User report sample description

Dataset

Users

Edit

Quick Navigation

Details

Columns

Filter by fields

Filter by groups

Sharing

↑ Scroll to top

Download

⋮

Edit details

Download

Generate

Delete

TIP: Report results expire after 48 hours to ensure that the data you download is up to date. You can refresh expired reports to generate the same report with updated information.

For more reporting guidance, view the **Reporting** section on the [TRAIN tutorial page](#).