



PeopleFluent Learning

# Reports Administration Guide

An overview of reports administration and generation  
in PeopleFluent Learning 23.03

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## About Reports Administration

PeopleFluent Learning provides a variety of ways to report on activity, including:

- Dashboard charts and reports
- A suite of standard reports
- Custom reports

### Dashboard

In the reports Dashboard you can display graphs and charts, and add standard and custom reports. On the Dashboards page, charts and reports are displayed in tabs. You can add more tabs to the page to show the charts, so you could use additional tabs to organize groups of charts.

### Standard Reports

The standard reports provided with the LMS are grouped into the following categories:

- Organization Reports
- Learning Reports
- Exam/Question Reports
- Compliance Reports
- Certification Reports
- System Reports

You can run reports from the Report Manager and add them to the My Reports tab on the Dashboard page. Most reports have mandatory and optional parameters, such as specifying the organizations for organization reports.

### Custom Reports

If none of the standard reports provide the information you need, you can create custom reports related to specific areas of the LMS. You create custom reports in the Report Wizard, which breaks down the report creation process into several stages. There are also advanced options for excluding empty results, sorting the report data, and editing the SQL WHERE clause.

### Report Execution and Output Options

When you select a report to run, you can specify the mandatory and optional parameters, if applicable, and select one of the following actions:

- Run the report immediately in the browser
- Run the report immediately in batch reports
- Schedule the report to run at a specified time, once or at regular intervals
- Add the report to the My Reports tab in the Dashboard

## Additional Information

[About the Reports Dashboard](#)

[About Standard Reports](#)

[About the Report Manager](#)

[About Custom Reports](#)

## About the Reports Dashboard

You can display graphs and charts and run custom reports in the reports Dashboard. There are three default tabs:

- **Charts**

This tab shows one or more dashboard charts that you can select from a list. You must select additional parameters for some charts, to target organizations, courses or users, for example.

- **My Reports**

You can select one or more standard or custom reports to add to this tab, so that you can run them from here. You can select only the reports for which you have at least read-only access permission.

- **Scheduled Reports**

This tab lists reports that have been configured to run according to a schedule. You can run these reports immediately in the browser, or update the schedule, if you have unrestricted access permission for the report.

You can add more tabs to the Dashboards page to show any of the charts also available to the Charts tab. You may want to use additional tabs to organize groups of charts.

To view charts and run reports from the reports dashboard, your system role must have unrestricted access to the *Dashboard* feature in System Roles (Review Features > Review Features).

The types of report you can add to the My Reports tab depend on your access permissions for the different report categories in System Roles (Manage Features > Report Categories).

To view scheduled reports and run them in the browser, your system role must have read-only access to the *Report Scheduler* feature in System Roles (Manage Features > Report Categories).

To view charts and run reports from the report dashboard, go to **Home > Reports > Dashboard**.

## Additional Information

[Add a Chart to the Reports Dashboard](#)

[Select Reports for My Reports](#)

[About Standard Reports](#)

[About Custom Reports](#)

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## Add a Chart to the Reports Dashboard

You can add one or more standard charts to the reports dashboard to show LMS data visually. You can add charts to the Charts tab, or to other tabs you have added to the dashboard. Some charts need additional parameters, to target organizations, courses or users, for example.

You cannot rearrange charts on the Charts tab once they have been added. You can only remove them and update their parameters, where applicable.

To add charts to the reports dashboard, your system role must have unrestricted access to the *Dashboard* feature in System Roles (Review Features > Review Features).

### To add a chart to the dashboard

1. Go to **Home > Reports > Dashboard**. The dashboard page opens with the Charts tab active. Any charts already added to the tab are shown.
2. Optionally, click **Add tab** to add a new blank tab to the dashboard.
3. Click **Add Chart**. The chart selection dialog opens.
4. Select a chart from the drop-down list and click **OK**. If the chart needs needs parameters, the chart's configuration page opens.
5. Select or enter the required parameters for the chart and click **OK**. The chart is added to the Charts tab. To remove a chart, click its **delete** icon.

## Additional Information

[About the Reports Dashboard](#)

## Select Reports for My Reports

You can select one or more standard or custom reports (created in the Report Wizard) to add to the My Reports tab in the reports Dashboard. You may want to add frequently used reports so that you can run them all from the same tab. You can also organize your selected reports into specific categories to help you find them more easily.

You can select only the reports for which you have at least read-only access permission. The types of report you can add to the My Reports tab depend on your access permissions for the different report categories in System Roles (Manage Features > Report Categories).

You can select one or more reports to add to the My Reports tab from within the My Reports tab and from the Report Wizard. You can also add standard reports individually when you open them from the Report Manager.

### To select reports to include in the My Reports tab

1. Go to **Home > Reports > Dashboard** and click **My Reports**. The My Reports tab lists any reports that have already been added.
2. Click **Select reports**. The standard reports are listed by category, followed by any custom reports to which you have at least read-only access.
3. Select the check boxes of the reports you want to add to the My Reports tab and then click **Add**. The reports are added to the My Reports tab under their original categories.
4. To move one or more reports to another category:
  - a. Select the check boxes of the reports to move.
  - b. In the *Change grouping category of selected reports* text box, enter the name of the category you want to move the selected reports to. This can be an existing category or you can create a new one.
  - c. Click **Update**. The selected reports are moved to the specified category.
5. To remove a report from the My Reports tab, select its check box and click **Delete**.

## Additional Information

[About the Reports Dashboard](#)

[About Standard Reports](#)

[About Custom Reports](#)



## About the Report Manager

From the Report Manager you can:

- Run standard reports, which are grouped into categories
- View, run and create custom reports in the Report Wizard
- View and edit report schedules
- Download batch reports that have been saved in a file
- Configure access permissions for standard reports

The reports available to you depend on your access permissions for the different report categories in System Roles (Manage Features > Report Categories).

To view, run and schedule standard reports from the Report Manager, your user role must have read-only access to the *Report Manager* feature in System Roles (Manage Features > Report Categories).

To view, run and schedule custom reports, your user role must have at least read-only access to the *Report Wizard* feature. To create custom reports in the Report Wizard, your role must have unrestricted access.

To access the Report Manager, go to **Home > Reports > Report Manager**.

## Additional Information

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[About Custom Reports](#)

[View and Edit Report Schedules](#)

[Download Batch Reports](#)

[Configure Standard Report Permissions](#)

## View and Edit Report Schedules

You can view, edit and delete report schedules from the Report Manager. You can also run scheduled reports immediately in the browser. System administrators can view the schedules for standard and custom reports, but non system administrators can view the schedules only for standard reports.

To view and immediately run report schedules, your user role must have at least read-only access to the *Report Scheduler* feature in System Roles (Manage Features > Report Categories). To edit and delete report schedules, your user role must have unrestricted access to the *Report Scheduler* feature.

Deleting a scheduled report does not delete the report, just its schedule.

### To view, edit and delete report schedules

1. Go to **Home > Reports > Report Manager**. The Report Manager opens.
2. Click **Scheduled Reports**. The Scheduled Reports page opens.
3. To delete one or more scheduled reports, select their check boxes and click **Delete**.
4. To view a report's schedule, click its name. The Schedule Report Properties page opens.
5. Update the schedule details as required and click **Set Schedule** to save it.

## Additional Information

[Schedule a Report](#)

[About the Report Manager](#)

## Schedule a Report

You can schedule standard and custom reports to run at a specified time, once or at regular intervals. When you have created a schedule for a report, it is added to the Scheduled Reports page in the Report Manager. Scheduled reports remain in the Scheduled Reports page until they are deleted.

You can update report schedules but only for reports that are still pending (that is, they are scheduled to run at least once in the future).

To schedule a report your system role must have unrestricted access to the *Report Scheduler* feature in System Roles (Manage Features > Report Categories), and at least read-only access to the *Report Manager* feature.

The standard reports available to you depend on your access permissions for the different report categories in System Roles (Manage Features > Report Categories).

### To schedule a report

1. Go to **Home > Reports > Report Manager**. The Report Manager opens.
2. Click the category containing the type report you want to schedule. The list of reports for the category opens.
3. Click the report name.
4. The report options and parameters page opens in a new window.
5. Select the output format for the report.
6. Select the parameters for the report.
7. Click **Schedule**. The Scheduled Report Properties page opens.
8. Optionally, update the Scheduled Task Name.
9. Select the schedule options.
10. Optionally, click the **browse** icon to select users to notify (by email) each time the report has run.
11. Optionally, change the notification email template.
12. Click **Set Schedule**.

## Additional Information

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## Download Batch Reports

Reports that are output to a file (for example, CSV or PDF) and completed scheduled reports are known as batch reports. You can download reports that were output to a file, and also view completed scheduled reports from the Batch Report page in the Report Manager.

To view or download batch reports, your user role must have at least read-only access to the *Report Manager* feature in System Roles (Manage Features > Report Categories).

### To view or download batch reports

1. Go to **Home > Reports > Report Manager**. The Report Manager opens.
2. Click **Batch Report**. The Batch Report page opens. It lists batch reports in reverse order of when they were generated.
3. Click the name of a report to either view it or download it, depending on its configured output format.

## Additional Information

[About the Report Manager](#)

[View and Edit Report Schedules](#)

## Configure Standard Report Permissions

You can configure access permissions to standard reports to specify the users that can access them.



To run reports, users must also have at least read-only access for the corresponding report categories features in System Roles (Manage Features > Report Categories).

To configure report permissions for users, your user role must have unrestricted access to the *Report Manager* feature in System Roles (Manage Features > Report Categories).

### To configure standard report permissions

1. Go to **Home > Reports > Report Permissions**. The Report Permissions page opens.
2. Click the name of the report you want to configure permissions for. The Permissions Selector opens in a new window.
3. Select the users for read-only access (you do not need to specify unrestricted access).
4. Click **Save**.
5. Click **Close**.

## Additional Information

Permissions

[About the Report Manager](#)

## About Standard Reports

The standard reports provided with the LMS are grouped into the following categories:

- Organization Reports
- Learning Reports
- Exam/Question Reports
- Compliance Reports
- Certification Reports
- System Reports

In the Manage Center, you can run reports from the Reports menu. From the Home page, you can run reports from the Report Manager and add them to the My Reports tab on the Dashboard page. Most reports have mandatory and optional parameters, such as specifying the organizations for organization reports. When you select a report, you can specify the parameters and select one of the following actions:

- Run the report immediately in the browser
- Run the report immediately in batch reports
- Schedule the report to run at a specified time, once or at regular intervals
- Add the report to the My Reports tab in the Dashboard

The standard reports available to you depend on your access permissions for the different report categories in System Roles (Manage Features > Report Categories).

To access the standard reports, go to **Home > Reports > Report Manager** or **Manage Center > Reports**.

## Additional Information

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[Add a Standard Report to the Dashboard](#)

[Organization Reports Reference](#)

[Learning Reports Reference](#)

[Exam and Question Reports Reference](#)

[Certification Reports Reference](#)

[System Reports Reference](#)

## Run a Standard Report

When you run a standard report, you have the following options:

- Run the report immediately in the browser
- Run the report immediately in batch reports
- Schedule the report to run at a specified time, once or at regular intervals
- Add the report to the My Reports tab in the Dashboard

You can run standard reports from the Report Manager. The standard reports available to you depend on your access permissions for the different report categories in System Roles (Manage Features > Report Categories).

### To run a standard report

1. Go to **Home > Reports > Report Manager**. The Report Manager opens.
2. Click the category containing the type report you want to run. The list of reports for the category opens.
3. Click the name of the report you want to run. The report options and parameters page opens in a new window.
4. Select the output format for the report.
5. Select the parameters for the report.
6. Click one of the buttons corresponding to how you want to run the report. Alternatively, click **Add to My Reports** at the top of the page to add the report to the My Reports tab in the Dashboard.

## Additional Information

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[Organization Reports Reference](#)

[Learning Reports Reference](#)

[Exam and Question Reports Reference](#)

[Certification Reports Reference](#)

[System Reports Reference](#)

## Add a Standard Report to the Dashboard

You can add standard reports to the My Reports tab in the report Dashboard.

To add standard reports to the Dashboard, your user role must have unrestricted access to the *Dashboard* feature in System Roles (Review Features > Review Features), and at least read-only access to the *Report Manager* feature (Manage Features > Report Categories).

### To add standard reports to the Dashboard

1. Go to **Home > Reports > Report Manager**. The Report Manager opens.
2. Click the category containing the type report you want to add. The list of reports for the category opens.
3. Click the name of the report you want to add. The report options and parameters page opens in a new window.
4. Click **Add to my reports** at the top of the page.

## Additional Information

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## Organization Reports Reference

This page lists the organization reports and a brief description of each.



When you select an organization for a report, all organizations below it in the hierarchy are also included.

### Organization reports:

- **R101 – Organization Account Summary Report by Organization**

This report lists the entries created in the accounts table when users buy a course. However, not all course enrollments add an entry in the accounts table, so this report does not list all course enrollments for each user. For example, learning programs add a single entry for the program, not for each course in the program.
- **R102 – Organization Learning Report by Participant**

This report lists all the courses taken by each person in the selected organization. Courses taken by multiple participants are listed for each participant.
- **R104 – Online Course Report for an Organization**

This report lists all participants within a selected organization who have taken an online course. The Overall Status column shows the status that was reported back to the LMS by the course (by SCORM or AICC run-time environments, for example). If a course does not report a status, its Overall Status in this report will always be set to *Incomplete*.
- **R105 – Users Listing by Organization**

This report lists all the users in the selected organization, along with some of their profile information and all user attribute values.
- **R106 – Organization Structure**

This simple report lists the child organizations and their level in the organization hierarchy within the selected organization. Organizations that have no users assigned to them are not included in the report.
- **R107 – Course Transcript Data**

This report shows basic transcript information for learners enrolled in courses in the selected organization.
- **R108 – Transcript Data (Online Module Details)**

This report shows basic transcript and CMI information for learners enrolled in online courses in the selected organization.
- **R109 – Generate User Data Dump in CSV Data Uploader Format**

This report can generate a comma-separated values (CSV) file of user data in the format used by the User Data Loader. You can edit the user data outside of the LMS and then import it as long as the column headers are not changed.
- **R110 – License Milestone User List**

This report lists learners who have completed the required number of minutes of the selected vendor's courses.

- R112 – Competency Report by Organization

This report lists learners in the selected organization who have achieved one or more of the selected competencies. The report includes competency details and associated job profiles.

- R112A – Current Competency User Progress by Organization / Direct Appraiser / User

This report lists the progress of learners in relation to their currently assigned job profiles, focusing on reporting unfinished modules and completed courses that may cause their competencies to expire. The report only includes the competencies in the learners' currently assigned job profiles.

- R112NL – Competency User Progress by Organization

This report lists the progress of learners in relation to their assigned competencies.

- R113 – Job Profile Report by Organization

This report list the users in the selected organization who are assigned the selected job profile.

- R114 – Direct Staff Training Report

Direct appraisers can run this report to view the overall status of each appraised learner's training history within a specified date range.

- R115 – Multi-Level Staff Training Report

Direct appraisers can run this report to view the overall status of up to five levels of appraised learners' training history within a specified date range. You can specify a single course for the report or include all courses.

- R116 – Job Profile Status Summary Report by Organization

This report shows summary information for learners' job profiles and associated competencies, grouped by learner.

- R116NL – Job Profile User Progress by Organization

This report shows learners' job profile progress and proficiency levels for required competencies. You can run this report for learners in one or more organizations, and for either a specific job profile or all job profiles.

- R117 – Job Profile Status Summary Report by Organization (Tabular)

This report shows summary information for learners' job profiles and associated competencies. This is similar to report R116 except that the information for all learners is listed in a single table.

- R118 – Appraisal Status Report

This report shows learners' performance review status information for appraisals started in the specified date range.



Appraisal features were included with the Performance license, which is no longer offered to new contracts.

- R119 – Appraisal Objective Report

This report provides a summary of the average scores associated with objectives from learners' completed appraisals started in the specified date range.



Appraisal features were included with the Performance license, which is no longer offered to new contracts.

- R120 – Appraisal Competency Report

This report provides a summary of the competency achievement ratings from learners' completed appraisals started in the specified date range.



Appraisal features were included with the Performance license, which is no longer offered to new contracts.

- R121 – User Group Membership Report

This report lists the user IDs of the users who are members of the selected user groups.

- R124 – Goal Progress Report

This report shows the progress of organizational goals for the specified goal program.



Goal Programs were included with the Performance license, which is no longer offered to new contracts.

- R125 – Goal Rating Report

This report summarizes employees' appraisal goals, including their average score.



Goals were included with the Performance license, which is no longer offered to new contracts.

- R128 – Generate User Profile Data Dump in CSV Data Uploader Format

This report can generate a comma-separated values (CSV) file of user profile data in the format used by the User Data Loader. You can edit the user data outside of the LMS and then import it as long as the column headers are not changed.

- R129 – Average Appraisal Ratings by User

This report lists, for each user's completed appraisals, their aggregated average ratings for goals, objectives, competencies and appraisal dimensions, as well as unweighted and weighted overall rating, and average overall rating as a percentage. This report benefits from using consistent rating scales across appraisals.



Appraisals and goals were included with the Performance license, which is no longer offered to new contracts.

- R130 – Average Appraisal Ratings by Organization

This report shows the average ratings across all completed appraisals for goals, objectives, competencies, appraisal dimensions, and overall ratings and aggregate them per selected organization (including data from descendent organizations). This report benefits from using consistent rating scales across appraisals.



Appraisals and goals were included with the Performance license, which is no longer offered to new contracts.

- R131 – Competency Drilldown Report

This report shows learners' compliance statuses for job profile, competencies and competencies' required learning modules. You can select multiple job profiles for this report.

- R132 – Organization Export in CSV Data Uploader Format

This report can generate a comma-separated values (CSV) file of organization data in the format used by the Organization Data Loader. You can edit the organization data outside of the LMS and then import it as long as the column headers are not changed.

- R135 – Competency Module Expiry Export in CSV Loader Format (by Organization)

This report can generate a comma-separated values (CSV) file of competency expiry data for the selected organization in the format used by the Competency Expiry Data Loader. You can edit the competency expiry data outside of the LMS and then import it as long as the column headers are not changed.

- R136 – Competency Module Expiry Export in CSV Loader Format (by User)

This report can generate a comma-separated values (CSV) file of competency expiry data for the selected users in the format used by the Competency Expiry Data Loader. You can edit the competency expiry data outside of the LMS and then import it as long as the column headers are not changed.

- R137 – Competency Ad-hoc Assessment Export in CSV Loader Format (by Organization)

This report can generate a comma-separated values (CSV) file of ad hoc competency awards acquired outside of the LMS for the selected organization in the format used by the Ad hoc Competency Assessment Data Loader. You can edit the competency award data outside of the LMS and then import it as long as the column headers are not changed.

- R138 – Competency Ad-hoc Assessment Export in CSV Loader Format (by User)

This report can generate a comma-separated values (CSV) file of ad hoc competency awards acquired outside of the LMS for the selected users in the format used by the Ad hoc Competency Assessment Data Loader. You can edit the competency award data outside of the LMS and then import it as long as the column headers are not changed.

- R139 - Job Profile Compliance Report

This Report includes the statuses of the Job Profile, Competencies, and associated Learning Modules as well as a plethora of user data points.

- R140 - Job Profile Competency Quota Report

This Report is used to verify the users who are needed to achieve the quota and to see those users who are expected to complete the associated learning elements.

## Additional Information

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[Run a Standard Report](#)

## Learning Reports Reference

This page lists the organization reports and a brief description of each.

Learning reports:

- R201 – Course Evaluation Summary for a Specific Module/Session

This report provides a summary analysis of the question responses for a course evaluation for the specified course session. The number of responses per question may vary as participants may skip particular questions.

- R202 – Enrollment Summary for Specified Modules/Sessions

This report lists the participants enrolled in the specified courses. The Attendance column is populated with a check box instructors can use when the report is printed. The Status column indicates the overall status, not the performance status within the course.

- R203 – Learning Activity Ranking (rated according to # of enrollments to-date)

This report shows the cumulative count of enrollments by course for learners in the selected organization.

- R204 – Individual Participant e-Certifications Awarded

This report lists the certifications awarded to a selected participant. It includes both manually and automatically awarded certifications.

- R205 – Country/Departmental Participants Awarded with e-Certifications

This report lists those users within the selected organization who have been awarded with the selected certifications. Several optional attributes may also be displayed within this report, depending upon system settings.

- R205NL – Awarded Certifications by Participant

This report lists all the certifications awarded to the specified participant(s).

- R206 – Sum of Modules Attributes

This report is typically used to calculate the amount of training hours learners have spent in the LMS. To use it, you need to set up a numeric module attribute with the *Sum total when printing or reporting* check box enabled. You then enter a value for this attribute in the modules that will count toward learners' training total duration.

- R207 – Learning Module Usage Report

This report shows, for learners in the selected organization, the total number of enrollments for a specified course and the total number learners who have accessed the course.

- R208 – Learning Program Usage Report

This report shows, for learners in the selected organization, the number of enrollments for a specified program's constituent learning modules and the number learners who have accessed each module.

- R208A – Course Time Tracking Report

This report shows, for all learners in the specified organization, the time spent in online courses between the specified start and end dates. The time tracked for each course is listed separately.

- R208B – Course Time Tracking Report

This report shows, for the specified learner, the time spent in online courses between the specified start and end dates. The time tracked for each course is listed separately.

- R209 – Participants Report on a Particular Module

This report provides performance details for the participants in the specified organization for the selected course. The Exam Score and Highest Score refer to internal details reported by an AICC- or SCORM-compliant course to the LMS, and do not include externally assigned exams.

- R209A – Course Time Tracking Report

This report provides performance details for the participants in the specified organizations for the selected course, whether they have completed it or not. The Exam Score and Highest Score refer to internal details reported by an AICC- or SCORM-compliant course to the LMS, and do not include externally assigned exams.

- R209B – Course Time Tracking Report

This report provides course time tracking details for a single participant within a specified date range, whether they have completed it or not.

- R210 – Attendance Sheet

This report generates an attendance sheet in PDF format for instructors to mark attendance for one or more learning modules or sessions. It is run as a batch report, which you can download as soon as it has been generated or at any time from **Report Manager > Batch Report**.

- R210B – Attendance Sheet

This report generates an attendance sheet for instructors to mark attendance for one or more learning modules or sessions. You can run the report immediately in the browser, as a batch report or a scheduled report.

- R210C – Attendance Sheet (PDF)

This report generates an attendance sheet in PDF format for one or more learning modules or sessions. You can use this report to filter the lists of attendees by the overall status for the module or session. It is run as a batch report, which you can download as soon as it has been generated or at any time from **Report Manager > Batch Report**.

- R210D – Standardized Attendance Sheet (PDF)

This report lists, in a standard format, the participants enrolled in the specified learning modules or sessions. It is run as a batch report, which you can download as soon as it has been generated or at any time from **Report Manager > Batch Report**. Company logos can be incorporated by replacing the following files in the `nd/fresco/images/logos` directory: `ReportR210DLogoTop.png` and `ReportR210DLogoBottom.png`.

- R210E – Simple Attendance Sheet (PDF)

This report, a simple form of report R210D, lists all the participants enrolled in the specified learning modules or sessions in a standardized format. It is run as a batch report, which you can download as soon as it has been generated or at any time from **Report Manager > Batch Report**. Company logos can be incorporated by replacing the following files in the `nd/fresco/images/logos` directory: `ReportR210DLogoTop.png` and `ReportR210DLogoBottom.png`.

- R211 – Participants Report on Particular Learning Programs

This report provides performance details for the participants in the specified organizations for the selected program, whether they have completed it or not. The Exam Score and Highest Score refer to internal details reported by an AICC- or SCORM-compliant course to the LMS, and do not include externally assigned exams.

- R212 – Instructor Resource Usage Report

This report lists the scheduled events to which the selected instructor is assigned, such as classes, workshops and virtual classes.

- R213 – Individual Participant Report on Learning Programs

This report provides learning program performance details for the selected participant. You can view their details for all their programs or filter the results for one or more specific programs. The Exam Score and Highest Score refer to internal details reported by an AICC- or SCORM-compliant course to the LMS, and do not include externally assigned exams.

- R214 – Individual Participant Report on Learning Modules

This report provides learning module performance details for the selected participant. The Exam Score and Highest Score refer to internal details reported by an AICC- or SCORM-compliant course to the LMS, and do not include externally assigned exams.

- R215 – Billing Report

This report shows the course fees for the selected course and the participants, grouped by organization, who have enrolled in it.

- R216 – Enrollment Statistics by Subject

This report lists the total number of enrollments for each organization, broken down by course subject.

- R218 – Cost Accounting Report for a Specific Learning Program/Module Session

This report lists the cost accounting category, the total cost, and estimated cost per person for the selected learning program or module session.

- R219 – Payment Advice for Each Participant Based on a Specific Learning Module/Session

This report creates payment advice slip PDF for the participants for the selected learning module or session.

- R220 – Invoice summary of a Specific Learning Module/Session

This report provides an invoice summary, sorted according to cost center, based on the selected learning module or session.

- R222 – Classroom and Workshop Summary Report

This report shows the average improvement of classroom and workshop students after attendance, based on pre-exam and post-exam scores.

- R222B – Simple Classroom and Workshop Summary Report

This report provides a summary for classroom or workshop sessions in a specified date range. It includes the total number of enrollments (both pending and confirmed), and the number of learners who have completed the session.

- R223 – Active Participants of a Learning Module by Organization



This report provides a summary of a learning module's active participants in the specified organization. The date range (start and end date) parameters only apply to participants that have accessed the course.

- R224 – Listing of Passed/Completed participants (according to CMI lesson status)

This report lists participants in the selected organization who have passed or completed online courses, according to the CMI lesson status but not transcript status. You can filter the report by course.

- R225 – Listing of Failed/Incomplete/Not Enrolled participants (according to CMI lesson status)

This report lists participants in the selected organization who have failed or not completed online courses (including those who are not enrolled), according to the CMI lesson status but not transcript status. You can filter the report by course.

- R230 – Mailing List/Name Badge/Name Plate Generation

This report generates an Excel spreadsheet of name badges for learners enrolled in the selected course or session. The Excel file can be downloaded from Batch Reports.

- R231 – Simple Program/Class listing

This report lists details of the learners enrolled in the selected learning program, module or session.

- R233 – Course Enrolments by Catalog/Country

This report shows the basic enrollment details for each course in the selected catalog. You can also filter the report by country.

- RC01 – Employee Learning Activity Report

This report displays a list of the courses taken by your employees within the specified date range. Besides participant name and department name, information such as the last time the participant accessed the course and the last attempted score are also included. When run as a system administrator, all users will be listed.

- R235 – List of Users NOT ENROLLED in a Program or Module

This report displays a list of the learners within the selected organization who do not have the selected course in their training history. This list excludes users who have previously completed the course and those who are currently enrolled, waitlisted or awaiting approval.

- R236 – Resource Usage for Enrollment Policies

This report displays a list of the courses that use each enrollment policy. Enrollment policies are assigned at the module level only. The default policy is excluded from this report, as all modules use it if they do not have an explicit assignment.

- R237 – Resource Usage for Auto-Enroll

This report displays a list of all sessions that have Auto-Enroll enabled. The individual session targeting criteria are not included in this report.

- R238 – Resource Usage for Scheduled Reports

This report displays a list of scheduled reports that may be automatically executed by the LMS at predetermined times. This list also includes reports that have been run once and are now no longer active.

- R239 – Resource Usage for E-mail Templates

This report displays a list of the courses and enrollment policies that use each email template. Email templates assigned to objects other than courses and enrollment policies are not included in this report.

- R240 – Course Catalog Training History Report

This report lists the training history for participants in the selected organization for the specified course catalog (and, optionally, its sub-catalogs).

Users with the following statuses are excluded from the report:

- Locked
- Account Closed
- Logically Deleted
- Self-registration Pending

- R240NL – NL Compliance Manager Org Training History Report

This report lists the training history records from the NL-Compliance Course Catalog for all users within the manager's organization (including child organizations).

Users with the following statuses are excluded from the report:

- Locked
- Account Closed
- Logically Deleted
- Self-registration Pending

- R241 – Course Catalog Configuration Report

This report lists the enrollment price, policy, knowledge center settings, and several module properties for the selected course catalog. Rows are sorted by learning ID. For learning program sessions having the same learning ID, they are in session order. For other sessions of learning objects having same learning ID, session start date is used for sorting.

- R242 – Pending Approvals Report

This report list all approvals that are still outstanding and the approver whose response is still pending. You can restrict the report to a specific learning module. Otherwise, all outstanding approvals are listed.

- R242NL – Pending Requests of a Specific Learning Module/Session

This report lists all approval requests that are still outstanding and the approver whose response is still pending. You can restrict the report to a specific learning module or session. Otherwise, all outstanding requests are listed.

- R246 – Courses Export by Catalog

This report lists course details for the courses in the selected catalogs. You can output this report to a CSV file to edit the courses outside of the LMS, and then import the updated CSV file via the Course CSV Data Loader.

- R247 – Courses Export by Course

This report lists course details for the selected courses. You can output this report to a CSV file to edit the courses outside of the LMS, and then import the updated CSV file via the Course CSV Data Loader.

- R250 – Course Catalog Direct Staff Training History Report

This report lists the training history records for a selected course catalog and for the direct staff of the person running the report.

Users with the following statuses are excluded from the report:

- Locked
- Account Closed
- Logically Deleted
- Self-registration Pending

- R250NL – NL-Compliance Direct Staff Training History Report

This report lists the training history records from the NL-Compliance course catalog and for the direct staff of the person running the report.

Users with the following statuses are excluded from the report:

- Locked
- Account Closed
- Logically Deleted
- Self-registration Pending

- R251 – Completed Courses by User(s)

This report lists the courses that have been completed by the specified users.

- R252 – List of Learning Module/Sessions of a Specific Instructor

This report list the courses and sessions assigned to the specified instructor. The columns Session Status, Start Date, End Date, and Instructor Name are properties of the learning module or session, even when linked to a learning program.

- R253 – Number of Participants by Learning Type for a Specific Period

This report shows the number of participants who have completed all learning activities within a specific period, classified by learning type.

- R254 – Courses Frequentation for a Specific Period

- This report shows the count of participants in the selected organization who completed one or more courses for a specified time period.
- The report columns are as follows:
  - *Month* shows month in YYYY-MM format.
  - *Frequentation* shows total number of participants (per month) who completed one or several courses. For example, if an employee completed three courses in November, they will add three to the count for November.
  - *Participants* shows the number of employees who attended a course in the specified months (one single employee account every month if more than one course in each month).

- *Number of Unique Employees* shows the number of employees who completed a course within the specified period. Even if an employee took two courses, they count as only one participant. In this column, an employee is recorded only once and within the first month of the course during the period.
- R255 – Number of Active Courses Available and Completed for a Specific Period  
This report provides a summary of course usage for a specific period. It only considers learning modules that contain one or more sessions (excluding learning programs). The *Number of Active Courses* column shows the courses that are shown in the catalog, regardless of the selected period. The *Number of Courses in Use* column shows the courses that have participants within the selected period whose transcript status is Completed.
- R258 – Learner Attendance for a Course Session  
This report will list learner attendance for a specific course session at individual class level.
- R261 – Assessment Workflow Exam/Evaluation Summary for Specified Modules/Sessions  
This report shows the assessment workflow exam or evaluation summaries for the selected modules or sessions, or for all sessions assigned one or more specified instructors.
- R262 – Organization Results of Learning Programs  
For a selected organization, this report lists the users and their status in each module of the selected programs.
- R263 – Indicated Interest Listing  
This report lists the users who have indicated an interest in a course. You may optionally select one or more courses and/or provide a time period in which to report on.
- R265 – Program Export by Program Session  
This report can output program session data to a CSV file, which you can edit outside of the LMS and then import via Program CSV Loader.
- R266 – AutoEnroll Transcript Listing  
This report lists basic transcript information for users in the selected organization who were auto-enrolled in the selected courses.
- R267 – AutoEnroll Criteria Listing  
This report lists the criteria settings for each course configured for auto-enroll processing. You can run this report for a specific course.

## Additional Information

[About Standard Reports](#)

## Exam and Question Reports Reference

This page lists the exam and question reports and a brief description of each.



When you select an organization for a report, all organizations below it in the hierarchy are also included.

Exam and question reports:

- R301 - Exam Summary Report

This report provides a summary analysis of the question responses for a specific exam. Only exams assigned to courses may be selected for this report. The summary is not restricted to a particular session.

- R302 - Question Response Analysis for a Specific Question for True/False and Single Choice

This report provides a summary and chart analysis of the responses to a specific question. It does not restrict the responses to a particular exam or course, all uses of the question are counted.

- R303 - Question Response Analysis for a Specific Question for Misc. Question Types

This report is for question types, other than Single Choice and True/False, and provides a more text-oriented listing of results.

- R304 - Survey/Feedback Summary Report

This report provides a summary analysis of the question responses for a specific survey. Only exams created as a survey can be selected for this report.

- R305 - User Exam Score and Status

This report lists the exam results for the selected course and exam combination, for all users in the selected organization. This report applies to exams created with the Exam Manager and assigned to courses externally. Only exams completed and auto-graded are included in the statistics.

- R307 - Assessment Exam Summary Report

This report lists the individual occurrences and scores for the selected exam, for all users within the selected organization. This report applies to exams created with the Exam Manager and assigned to courses externally. They are launched from the course Knowledge Center, not internally within the course.

- R308 - Complete Exam Question Response Listing (one per row)

This report lists the individual question response details (one per row) of the selected exam in a matrix form suitable for exporting to Excel. Because it is intended for Excel, the individual rows contain redundant user, organization, and exam level qualifiers needed for sorting and grouping individual questions.

- R308A - Complete Exam Question Response Listing (Multiple Exams)

This report lists the individual question response details (one per row) of the one or more selected exams in a matrix form suitable for exporting to Excel.

- R309 - Complete Exam Question Response Listing (matrix format)

This report lists the individual question response details (one per row) of the selected exam in a matrix form suitable for exporting to Excel. Because it is intended for Excel, the non-text question responses for single choice, multiple choice, rating and other non-text questions, are shown as the numeric selection value (from 1 to however many answer options there are), not the original question choice text.

- R310 - List of Users Who Have NOT YET TAKEN an Exam

This report displays a list of the users enrolled in the selected course or program who have not yet taken the associated exams as defined in the catalog editor.

This report only lists users for exams that have been assigned to a course and not for exams that are launched as courses. If a course has multiple exams, it includes users who have not yet launched any of these internal exams. Also, taking an exam in any form, even with another course, will exclude the learner from this list.

- R311 - Questions Detail Listing

This report lists details of individual questions (one per row), including question text, possible responses and correct answers, for exams in the specified pools.

- R312 - Questions Exporter

This report lists details of individual questions (one per row) in the specified question pool. It outputs data in the same format used by the Question CSV Loader, so that you can export the report to a CSV file, edit the questions outside of the LMS, and the import them.

- R313 - Exam Results

This report lists participants' exam scores in the selected exams, as long as they have been completed.

The scores are shown for the latest exam instance only. That is, if the participant has completed the same exam more than once, only the score of the latest instance is displayed. You can use the start date and end date to filter date range for completed exams.

- R314 - Learner Performance at Question Level for An Exam

This report charts the performance of learners for each question in the exam using C (Correct), I (Incorrect), and NA (Not Attempted). This report is only suitable for fixed exams and responses that are partially correct are reported as correct.

- R315 - Exam Results (Report on wrong attempts)

This report shows the percentage of wrong attempts of questions for the selected exams. Questions with question types like essay, rating, and triple rating are not analyzed in this report since there is no defined model answer.

- R316 - OJT Supervisor Assessment Summary Report

This report charts question-level assessment results for the selected exam. This report is only suitable for fixed question assessments; responses that are partially correct are reported as correct.

- R317 - Exam Results (Per User)

This report displays the results for the selected user and exam. It is output only as a PDF, so must be run as a batch report and then downloaded.

- R318 - Complete Evaluation Question Response Listing (one per row, by learning program/module session)

This report lists the individual question response details (one per row) of the selected evaluation in a matrix form suitable for exporting to Excel.

Because it is intended for Excel, the individual rows contain redundant user, organization, and exam level qualifiers needed for sorting and grouping individual questions.

## Additional Information

[About Standard Reports](#)

## Certification Reports Reference

This page lists the certification reports and a brief description of each.



When you select an organization for a report, all organizations below it in the hierarchy are also included.

### Certification reports:

- R601 - Certificate Awards Due to Expire

This report lists, for one or more organizations, the awarded certifications that are due to expire within the specified time period. You can optionally restrict the report to a selection of one or more certifications, and you do not have to specify a date range.

- R602 - Participants Not Certified

This report lists learners in the specified organizations who have not been awarded one or more of the selected selected certifications.

- R603 - Awarded Certificates Export in CSV Data Uploader Format (by Organizations)

This report generates a list of awarded certifications in a format that can be uploaded via the Awarded Certifications CSV Loader. Therefore, you can output this report to a CSV file and edit it outside of the LMS. You can filter the report by one or more organizations and certifications, and by the issue date range.

- R604 - Awarded Certificates Export in CSV Data Uploader Format (by Participants)

This report generates a list of awarded certifications in a format that can be uploaded via the Awarded Certifications CSV Loader. Therefore, you can output this report to a CSV file and edit it outside of the LMS. You can filter the report by one or more participants and certifications, and by the issue date range.

## Additional Information

[About Standard Reports](#)



## Compliance Reports Reference

This page lists the compliance reports and a brief description of each.



When you select an organization for a report, all organizations below it in the hierarchy are also included.

### Compliance reports:

- **R501 - Module Completion Target Status**  
This report identifies individual completion status for a module with an assigned completion target date.
- **R502 - Program Completion Status**  
This report identifies individual completion status for modules within a program.
- **R503 - Mass Distribution Program Compliance Status (ORG membership based)**  
This report identifies completion percentage for modules within a program. When scheduled, this report is individually run for each named organization and contains users within that organization, and is distributed to the recipients identified in the organization properties for each organization unit. This results in one unique report per organization.
- **R504 - Mass Distribution Program Compliance Status (DA-based)**  
This report identifies completion percentage for modules within a program. When scheduled, this report is individually run for each named organization and contains the direct reports of the named manager for the organization, and is distributed to the recipients identified in the organization properties for each organization unit. This results in one unique report per organization.
- **R505 - Audit Trail Report**  
This report displays the audit trail for the selected item within the specified date range. The audit trail is displayed in chronological order of audit date. It is recommended that the selected date range be as short as possible, as when selecting a wider date range, it might take a while to generate the report due to the size of the data.
- **R506 - Audit Trail User Action Report**  
This report displays the audit trail for a given set of users within the specified date range. The audit trail is displayed in chronological order of audit date. It is recommended that the selected date range be as short as possible, as when selecting a wider date range, it might take a while to generate the report due to the size of the data.
- **R507 - Learning Module Audit Report**  
This report displays audit trail for a given set of Learning modules within the specified date range. The audit trail is displayed in chronological order of audit date. It is recommended that the selected date range be as short as possible, as when selecting a wider date range, it might take a while to generate the report due to the size of the data.
- **R508 - User Transcript Audit Report**

This report displays audit trail of transcript for a selected learning module within the specified date range. The audit trail is displayed in chronological order of audit date. It is recommended that the selected date range be as short as possible, as when selecting a wider date range, it might take a while to generate the report due to the size of the data.

- R509 - Module Completion Audit Compliance report

This report identifies individual completion status for learning modules required for compliance training.

- R510 - Module Deadline Completion Percentage by Organization

This report identifies the percentage of users who have completed one (or all) assigned modules associated with a deadline.

## Additional Information

[About Standard Reports](#)

## System Reports Reference

This page lists the system reports and a brief description of each.



When you select an organization for a report, all organizations below it in the hierarchy are also included.

### System reports:

- **401 - User System Activity Summary**  
This report lists the log-in activity of all participants within the selected organization.
- **402 - User ID Report Listing Direct Appraiser Details**  
This report lists all users within an organization plus their direct appraiser (if set).
- **403 - User Activity Report (in last log-in sequence)**  
This report lists all users within the selected organization, ordered by their last login date. It also shows the number of times they have logged in. You can re-order the list—and toggle between ascending and descending—by last login date, number of logins, and organization (where the selected organization contains sub-organizations).
- **404 - Report Listing User Days Live (with Organization Name)**  
This report lists all users within the selected organization added to the LMS during the specified date range, and shows the number of days since they were added, their status, their last login date, and their organization.
- **405 - Report Listing User Days Live**  
This report lists all users within the selected organization added to the LMS during the specified date range, and shows the number of days since they were added, their status, their last login date, and number of logins.
- **406 - Number of New Users per Department (Total Number)**  
This report gives a count of the users added to the selected organization, optionally during a specified date range. If the organization contains sub-organizations (for example, departments), the list is broken down by department.
- **407 - Number of New Users per Department (List Users)**  
This report lists the users added to the selected organization during the specified date range.
- **408 - Log Ins within Defined Period**  
This report lists users from the selected organization who have logged in during the defined date range. This report requires login auditing to be enabled in the `ekp.properties` file (the `system.auditoptions` value must include `L`).
- **409 - Audit Log Listing**  
This report lists the audit log entries for the selected user and the specified date range. You can optionally restrict the entries to a single participant and/or course.

- 410 - Payment Transaction Report

This report lists the account entries for course payments (including zero payments) by participants in the selected organization. Because the report includes all learning types, which can take long time to process, PeopleFluent recommend specifying a date range.

Entries with id in the description refer to an external payment.

The course title and learning type may not be shown for a transaction if the transaction is a refund or if the associated module has been deleted.

- 411 - Invoicing Report

This report lists invoice information for the purchase of courses, optionally within a specific date range.

- 413 - Token Expiry

This report lists token accounts with tokens that have an expiry date.

- 414 - Token Purchase

This report lists token purchases, including the token value and cost, for one or more selected organizations.

- 415 - Token Manual Adjustment

This report shows manually adjusted tokens during the (optional) date range. You can filter the report to include token accounts that are related to certain users and/or organizations.

- 416 - Token Balance

This report shows the current balance of token accounts associated with organizations and users.

- 417 - Token Usage

This report shows details of token usage for one or more selected organizations.

- 418 - Generate Role Access Control Data Dump in CSV Data Uploader Format

This report generates a role access control data dump for one or more selected roles in a format that can be exported to a CSV file, updated outside of the LMS, and then imported via the Role Access Data Loader.

- 419 - Job Profile Export in CSV Data Uploader Format

This report generates a job profile and competency assignments data dump for one or more selected job profiles in a format that can be exported to a CSV file, updated outside of the LMS, and then imported via the Job Profile Data Loader.

- 420 - Competency Export in CSV Data Uploader Format

This report generates a competency and learning assignments data dump for one or more selected competencies in a format that can be exported to a CSV file, updated outside of the LMS, and then imported via the Competency Data Loader.

- 421 - Merged User IDs Report

This report lists the details of merged user accounts actioned by the Merge User ID Data Loader.

- 422 - Job Profile Assignments in CSV Data Loader Format

This report generates a job profile assignment data dump for users in the selected organizations in a format that can be exported to a CSV file, updated outside of the LMS, and then imported via the Job Profile Assignment Data Loader.

## Additional Information

[About Standard Reports](#)

## About Custom Reports

If none of the standard reports provide the information you need, you can create custom reports related to specific areas of the LMS. You create custom reports in the Report Wizard, which breaks down the report creation process into several stages. There are also advanced options for excluding empty results, sorting the report data, and editing the SQL WHERE clause.

You must give your custom reports a unique ID and a report name. You must also select a report type, which corresponds to the type of data you want to report on (for example, learning module information, certifications or exam results). The report type determines the columns you can select data from.

To create custom reports in the Report Wizard, your user role must have unrestricted access to the *Report Wizard* feature in System Roles (Manage Features > Report Categories).

To view, run and create custom reports, go to **Home > Reports > Report Manager > Report Wizard**.

## Additional Information

[Run a Custom Report](#)

[Create a Custom Report](#)

[Add a Custom Report to the Dashboard](#)

[About the Report Manager](#)

## Run a Custom Report

When you run a custom report, you have the following options:

- Run the report immediately in the browser
- Run the report immediately in batch reports
- Schedule the report to run at a specified time, once or at regular intervals

You can also add the report to the My Reports tab in the Dashboard.

You can run custom reports from the Report Wizard. The custom reports available to you depend on your access permissions for them. Your user role must also have at least read-only access to the *Report Wizard* feature in System Roles (Manage Features > Report Categories).

To create a schedule to run the report automatically, your user role must have unrestricted access to the *Report Scheduler* feature in System Roles (Manage Features > Report Categories).

### To run a custom report

1. Go to **Home > Reports > Report Manager**. The Report Manager opens.
2. Click **Report Wizard**. The Report Wizard opens and lists existing custom reports (grouped by report type) to which you have access.
3. Click the Report ID of the report to run. The report opens in a new window.
4. If you created the report, click **Summary** to go to the report summary.
5. Select the output format for the report.
6. Select the parameters for the report.
7. Click one of the buttons corresponding to how you want to run the report:
  - **Run now in browser**
  - **Run now in batch reports**
  - **Schedule**

## Additional Information

[Create a Custom Report](#)

[Schedule a Report](#)

[Add a Custom Report to the Dashboard](#)

[About the Report Manager](#)

## Create a Custom Report

You create custom reports in the Report Wizard, which breaks down the process of creating a report into several stages:

- Properties
- Columns
- Grouping
- Order
- Filters
- Summary

In advanced mode you can also specify whether to return *NULL* values, change the column sorting, and edit the *WHERE* statement in the SQL that retrieves the report data.

### To create a custom report

1. Go to **Home > Reports > Report Manager**. The Report Manager opens.
2. Click **Report Wizard**. The Report Wizard opens with a list of custom reports for which you have at least read-only access permission.
3. Click **+ Create Report**. The *Create a new report* page opens at the Properties step.
4. Enter a unique ID for the report.
5. Enter the report name.
6. Select the report type from the drop-down list. The type of data returned by the selected report type is shown below the drop-down.
7. Click **Save**.

Next step: [Select Custom Report Columns](#).

## Additional Information

[Select Custom Report Grouping Information](#)

[Select Custom Report Column Order](#)

[Select Custom Report Column Filters](#)

[Select Custom Report Output Options and Access Permissions](#)

[Select Optional Tables for Custom Reports \(Advanced\)](#)

[Select Custom Report Columns to Sort on \(Advanced\)](#)

[Edit Custom Report SQL Selection Criteria \(Advanced\)](#)

[About Custom Reports](#)



## Select Custom Report Columns

When creating a custom report you can select the columns to include in the report output. The columns you can include depend on the report type you selected in the Properties step. The available columns are organized into groups of related data (for example, user properties, competency). You can include columns from multiple groups.

### To select the columns to include in a custom report

1. In the Report Wizard, click **Columns**. The column groups are listed.
2. Click a column group heading to expand the group and show the available columns. Alternatively, click **Expand All** to show all the columns from all groups.
3. Select the check boxes of the columns you want to include in the report. You can hover the pointer over the column for a brief description.
4. Repeat steps 2 and 3 to add columns from other groups.
5. Click **Save**.

Next step: [Select Custom Report Grouping Information](#)

Previous step: [Create a Custom Report](#)

## Additional Information

[Select Custom Report Column Order](#)

[Select Custom Report Column Filters](#)

[Select Custom Report Output Options and Access Permissions](#)

[Select Optional Tables for Custom Reports \(Advanced\)](#)

[Select Custom Report Columns to Sort on \(Advanced\)](#)

[Edit Custom Report SQL Selection Criteria \(Advanced\)](#)

[About Custom Reports](#)

## Select Custom Report Grouping Information

When creating a custom report you can select the summary information to include. This can be useful for numerical data, where you can retrieve totals and the minimum, maximum and average values, for example.

### To select the grouping information to include in a custom report

1. In the Report Wizard, click **Grouping**. The columns are listed.
2. Select the check boxes for the summary information you want to include.
3. Click **Save**.

Next step: [Select Custom Report Column Order](#)

Previous step: [Select Custom Report Columns](#).

## Additional Information

[Create a Custom Report](#)

[Select Custom Report Column Filters](#)

[Select Custom Report Output Options and Access Permissions](#)

[Select Optional Tables for Custom Reports \(Advanced\)](#)

[Select Custom Report Columns to Sort on \(Advanced\)](#)

[Edit Custom Report SQL Selection Criteria \(Advanced\)](#)

[About Custom Reports](#)

## Select Custom Report Column Order

When creating a custom report you can select the order in which the columns are shown in the report output. By default columns are shown in the order presented in the Columns step of the Report Wizard.

### To change the column ordering in a custom report

1. In the Report Wizard, click **Order**. The columns selected for the report are listed in their default order.
2. Click and drag a column to a new position in the list.
3. Click **Save**.

Next step: [Select Custom Report Column Filters](#)

Previous step: [Select Custom Report Grouping Information](#).

## Additional Information

[Create a Custom Report](#)

[Select Custom Report Columns](#)

[Select Custom Report Output Options and Access Permissions](#)

[Select Optional Tables for Custom Reports \(Advanced\)](#)

[Select Custom Report Columns to Sort on \(Advanced\)](#)

[Edit Custom Report SQL Selection Criteria \(Advanced\)](#)

[About Custom Reports](#)

## Select Custom Report Column Filters

When creating a custom report you can select the criteria used to filter the records returned in the report. You can add multiple filters, and the filters available depend on the report type (specified in the Properties step of the Report Wizard).

The *Business Unit Details - User and Organization Visibility* filter is always applied and its value determines which users can be included in the report results. There are two possible values, which you can choose between if you edit this filter:

- Users and Organizations filtered based on User executing the report (default value)
- Users and Organizations filtered based on Report Owner

### To select the filter criteria for the custom report results

1. In the Report Wizard, click **Filters**. Any existing column filters columns are listed in the table.
2. Select a column from the Filter drop-down list. The column is added to the bottom of the table of filters.
3. Select the operator from the drop-down list. The choice of operators varies depending on the data type of the filter column.
4. Enter the value to compare the report data with.
5. Select any other options specific to the filter column's data type (for example, whether text is case-sensitive, or for dates, whether a date is relative to the report execution date instead of a fixed date).
6. Click **Add**. The filter is added to the list.
7. Repeat steps 2 to 6 to add more filters.
8. Optionally, click **Delete** and **Edit** to delete and edit individual filters, respectively.
9. Click **Save**.

Next step: [Select Custom Report Output Options and Access Permissions](#)

Previous step: [Select Custom Report Column Order](#)

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## Select Custom Report Output Options and Access Permissions

When creating a custom report the Summary step shows the report properties, columns, and column grouping and filtering, if applied. You can select the output format and configure the report's access permissions. Only users with unrestricted access permission can edit the report in the wizard. Users with read-only or unrestricted access can run the report. After saving the report, you can also run it or schedule it.

### To select output options and configure access permissions

1. In the Report Wizard, click **Summary**. The report summary is shown.
2. Select the output format for the report.
3. Select the check boxes for the additional output options, as required.
4. Optionally, click **Permissions** to update the access permissions for the report.
5. Optionally, click **Advanced** to enable the advanced options for the report.
6. Click **Save**.

## Additional Information

### Permissions

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## Select Optional Tables for Custom Reports (Advanced)

When creating a custom report you can select optional tables. If an optional table has no data for any records returned by the report, the table's selected columns are shown with no values. For example, if Direct Appraiser - User ID is selected as a column to show in a report that returns a list of learners, but you want to include learners who do not have a direct appraiser, you would select the Direct Appraiser table as optional.



By default, all tables are selected as optional.

### To select optional tables

1. In the Report Wizard, click **Advanced**. Additional steps are shown in the wizard's navigation bar.
2. Click **Ext. tables**. The tables you can select as optional are listed.
3. Select a table's check box to include rows in the report output that do not have a record in the table. Alternatively, clear its check box to exclude results where the table contains no data.
4. Click **Save**.

## Additional Information

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## Select Custom Report Columns to Sort on (Advanced)

When creating a custom report you can specify the order in which the results are sorted. You can sort the results on one or more columns, taken in any order, but results are always sorted in ascending order. To configure a report's sort order, you select the columns to sort on and then specify the sequence in which those columns are sorted. For example, you might sort on Module ID and then User ID to sort the results by course and then, for each course, the participants.



You can sort the columns in reports output to CSV files directly in a spreadsheet application.

### To select the columns to sort on

1. In the Report Wizard, click **Advanced**. Additional steps are shown in the wizard's navigation bar.
2. Click **Sorting**. The tables you can sort on are listed.
3. Select the check boxes of the tables you want to sort on.
4. Enter the order in which the columns are used to sort the results. Enter 1 for the highest priority, 2 for the next highest and so on.
5. Click **Save**.

## Additional Information

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## Edit Custom Report SQL Selection Criteria (Advanced)

When creating a custom report you can append additional filter criteria to the SQL WHERE clause to create ad hoc filters. You can also update the WHERE clause itself, which reflects the filters selected in the Filters page of the Report Wizard. The SQL statement shows you the tables you can use for your filters.

To edit the SQL for selection criteria

1. In the Report Wizard, click **Advanced**. Additional steps are shown in the wizard's navigation bar.
2. Click **Edit SQL**. The SQL SELECT statement for the report is shown, along with the SQL for the filter.
3. Enter your additional filter criteria in the bottom, editable text box. Start with AND.
4. Optionally, select the check box to edit the original filter criteria (the WHERE clause).
5. Click **Save**.

## Additional Information

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## Add a Custom Report to the Dashboard

You can add custom reports to the My Reports tab in the report Dashboard.

To add custom reports to the Dashboard, your user role must have unrestricted access to the *Dashboard* feature in System Roles (Review Features > Review Features), and at least read-only access to the *Report Manager* feature (Manage Features > Report Categories).

### To add custom reports to the Dashboard

1. Go to **Home > Reports > Report Manager**. The Report Manager opens.
2. Click **Report Wizard**. The Report Wizard opens and lists existing custom reports (grouped by report type) to which you have access.
3. Select the check boxes of the reports you want to add to the Dashboard.
4. Select **Add to my reports** from the Bulk Action drop-down list.

## Additional Information

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