

Completed Courses at Your Organization

- 1. Reporting tab > Custom Reports
- 2. Click "New" in the middle of the screen
- 3. Select "Multi-module" report (This should take you to the Report Designer Page)

Reports	🌲 Assignment Report
	🛔 Curriculum Transcript Report
	💼 Evaluations Report
Need help understanding the usage of various custom reporting fields? Click the appropriate link below to learn about various custom report field types: User Fields Training Fields Transcript Fields Transaction Fields Training Request Form Fields ILT Session Part Fields ILT Instructor Fields	A Multi-Module Report
Custom Report Troubleshooting Tips	Playlist Report
	👗 Talent Pool Report
For additional information the ONLINE HELP is always available.	💼 Test Report
Online Help access please CLICK HERE.	🔟 Training Form Report
	🔟 Training Form Task Report
Click "All Folders" on the left to view all your reports. Click any folder to view reports within that folder. Right click a folder to view options for it. Drag and drop folder	Training Plan Report
Use the New button to create a new folder or report. Drag and drop a report to a folder to move it to that folder.	Training Report
To view data for the last three runs of a report, click "History" in the Actions column. For the most recent data, click "Refresh" to process the report.	💼 Training Unit Distributor Report
	Training Unit Key Code Report
Folders Custom Report Show Me	Transaction Report
All Folders Multi-Module Report Ran Anytime S	Search New -

- 4. Field headers are equivalent to header titles on an Excel Spreadsheet
 - a. What information do you want the report to tell you?
- 5. Type in the following field headers right below the "Refresh" button
 - a. User ID
 - b. User first name
 - c. User last name
 - d. Organization
 - e. Training title
 - f. Transcript status
 - g. Transcript completed date

Custom Repor	t						
Field Filters ² Us	ser/OU Filters ¹ Sort ¹	Summary ² Sharing	Schedule Delive	ry Chart [®] Publish			
* Type or drag a field	here		•				
				\frown			
					Maximum numbe	er of records 5000	Options v Actions v
							Actions +
User ID	User First Name	User Last Name	Organization	Training Title	Transcript Status	Transcript Completed Date	* Type or drag a field here
	User First Name	User Last Name	Organization	Training Title			
	User First Name	User Last Name	Organization	Training Title			
	User First Name	User Last Name	Organization	Training Title			



6. Add your "Field Filters". This is the first tab under "Custom Report" header

Field Filters ¹ User/OU Filters ¹ Sort ² Summary ¹ Sharing ¹	Schedule ²	Delivery	Chart	
\smile				
* Type or drag a field here	•			

7. Type in **Transcript Completed Date** "is on or after" (select start date) **This is where you will customize your date parameters*

Add another field filter. Type in **Transcript Completed Date** "is on or before" (select end date) **If you want your end date to be present, then you don't have to add the second field filter. You only have to input the start date.*

Custom Report	
Field Filters ² User/OU Filters ² Soc ² Sommary ² Sharing ²	Scnedule Delivery Chart Publish
Transcript Completed Date	✓ is on or after
Transcript Completed Date	▼ is on or before \$ 1/1/2019
* Type or drag a field here	•

- 8. Click the "Refresh" button to populate your report
- 9. Create a Report Title on the top left-hand corner
- 10. Click "Save"

*Wait for the "save successful" message before clicking "Close"

- 11. You will land on the main custom reports page, where the report will process. Processing time should take 10-20 seconds. You can refresh the page if it doesn't process after 20 seconds.
- 12. Once the report is processed, click on the right-hand dropdown arrow under **Actions** and choose "**Excel**"
- 13. The Excel spreadsheet will download to your computer
- 14. Save this report, so you don't have to re-create it again. When you want to run the report in the future, go back to this page and choose the "Refresh" option under "Actions". If you want to make edits to this report (i.e. change the date parameters), you can choose the "Edit" button under "Actions" which will allow you to make edits. Then save, close and wait to process again.

