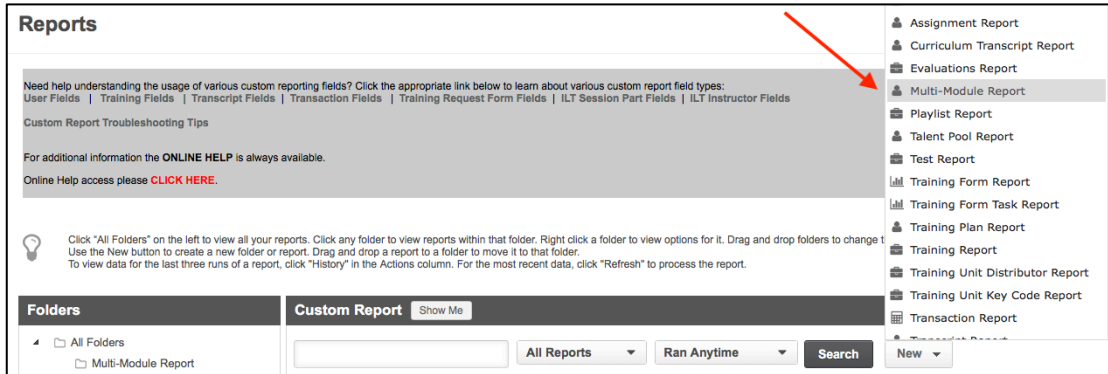# Creating a Custom Report

*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**)

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
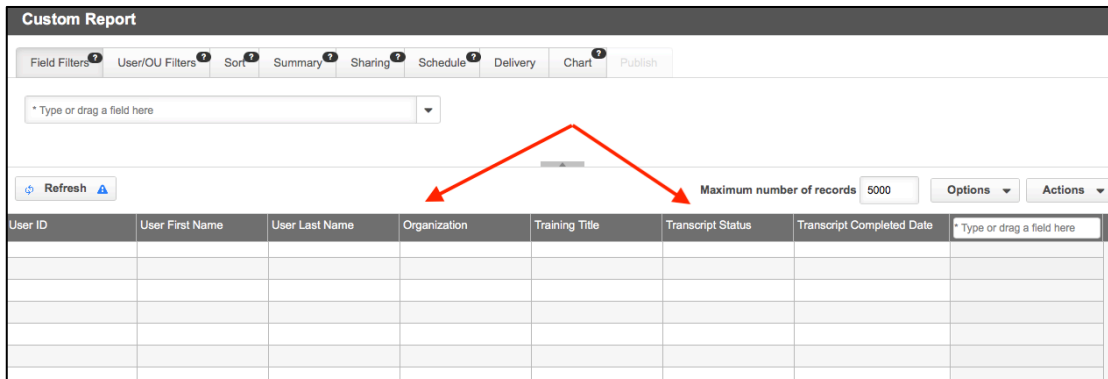
6. Add your "**Field Filters**". This is the first tab under "**Custom Report**" header
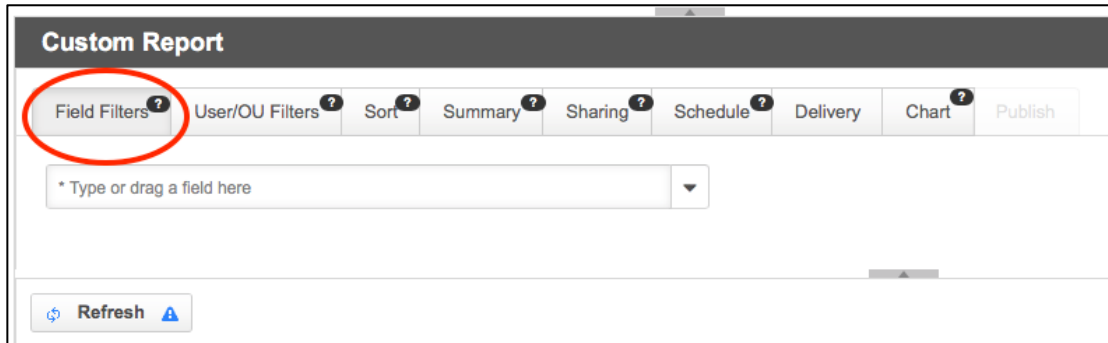
7. Type in **Transcript Completed Date** "is on or after" (select start date)
    This is where you will customize your date parameters

    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.
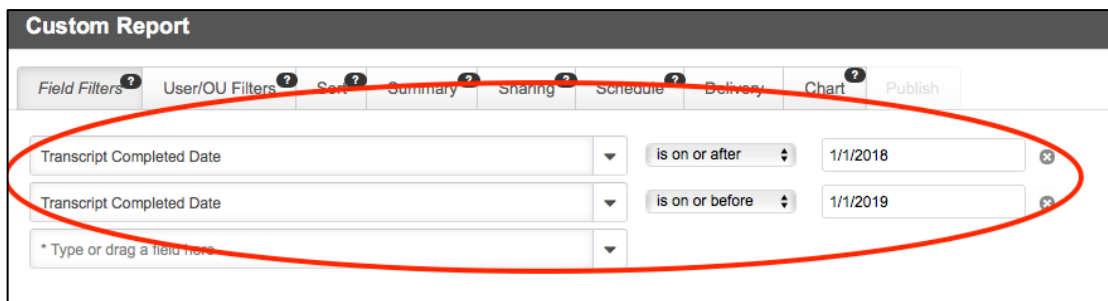
8. Click the "**Refresh**" button to populate your report

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.

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