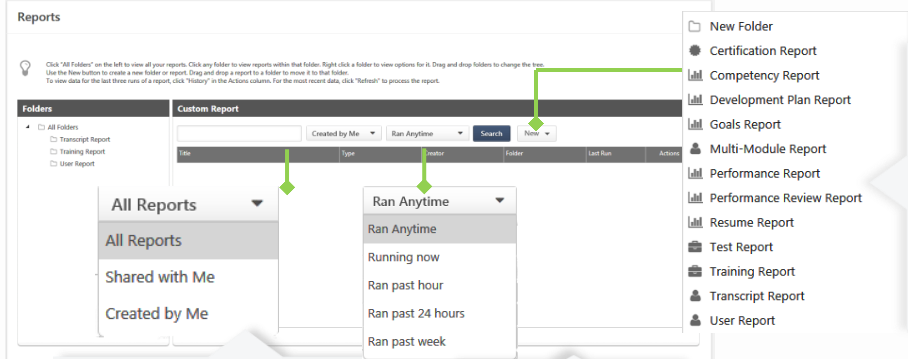
Custom reports can be created from hundreds of available data points in one comprehensive report. The data that is included in the report can be taken from different areas of the system and filters can be applied to present a precise view of the appropriate information. These reports can be easily shared with other users in the organization and the data contained in the report can be refreshed in real time via the *Real Time Data Warehouse (RTDW)*.
The Chart tab allows users to create charts for custom reports and is available for all custom report types.



The table lists the available reports types in the custom reports.

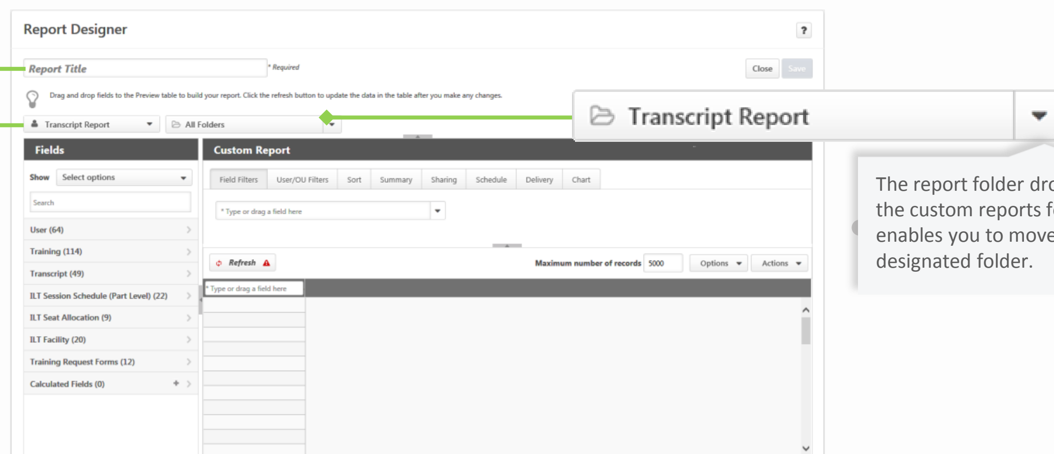
To create a custom report folder, from the New drop-down, select the New Folder option. A new folder is added to the bottom of the Folders panel and you can enter a name for the folder. The character limit for a folder name is 200.

Use the permission filter drop-down next to the search field to change the reports that are displayed.

- **All Reports**: displays all available reports, regardless of who created the report
- **Shared with Me**: displays reports that have been shared with you
- **Created by Me**: displays reports that you have created

Use the **runtime filter** drop-down to change the reports that are displayed.

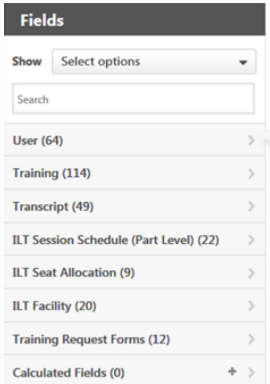
Naming the report in the Custom Report Builder is required in order to save the report. The **Save** button is not enabled until a report title is entered. The name can be defined and edited at any time during the report configuration process and should be descriptive and meaningful.



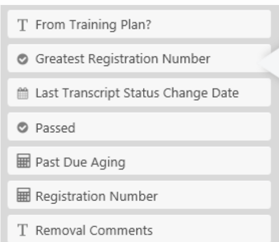
The report folder drop-down displays the custom reports folder hierarchy and enables you to move reports into a designated folder.

The report type drop-down displays the type of report being designed.

CUSTOM REPORTING



The **Fields** panel that displays on the left side of the Custom Report Builder page enables you to select the fields to include in the report. You can select fields from the list of fields that display in each field type section of the **Fields** panel. Or, you can use the **Type or drag a field here** box that displays above the report preview panel.



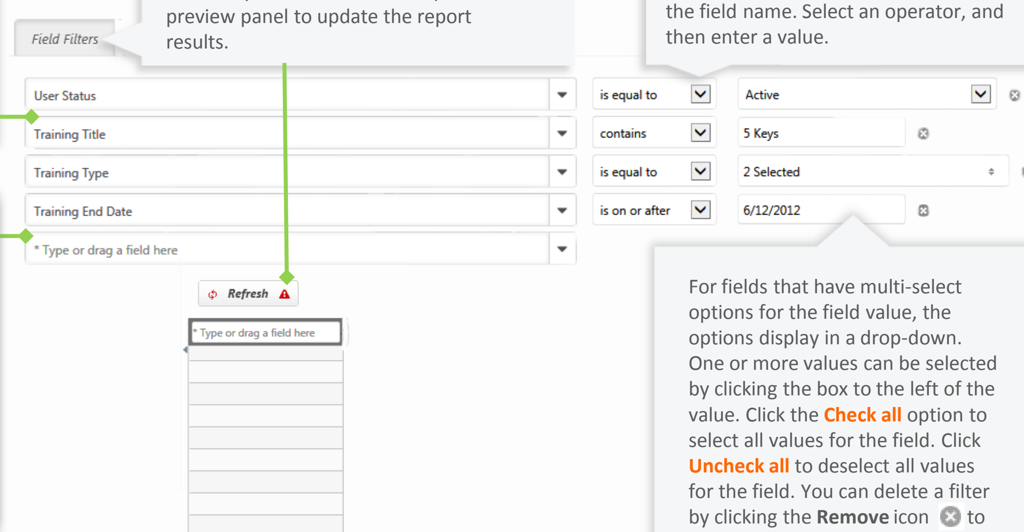
Each field type section displays the fields associated with the field type. Each field is identified within the section as **text** T **numeric** **date** or **True/False**.

To add fields to the report:

- Click the field name in the field type section.
- Drag and drop the field into the **Type or drag a field here** box.
- Enter a field name in the **Type or drag a field here** box.

The **Field Filters** tab enables you to filter the report fields in order to narrow down the report results. Once the filters are defined, you can refresh the report preview panel to update the report results.

An operator drop-down and value field automatically populate to the right of the field name. Select an operator, and then enter a value.



For fields that have multi-select options for the field value, the options display in a drop-down. One or more values can be selected by clicking the box to the left of the value. Click the **Check all** option to select all values for the field. Click **Uncheck all** to deselect all values for the field. You can delete a filter by clicking the **Remove** icon to the right of value field.

Fields to Select	
Section	**Field**
User	Full Name
	ID
	Position
Training	Title
	Type
Transcript	Completion Date
	Due Date
	Required
	Score
	Status

Filter	
Sort By	**Field**
Sort By	Training Title
Then By	Transcript Status

Compliance Tracking - Custom Transcript Report

This custom transcript report will provide the information necessary to ensure students have complied with training requirements.

Sort/Summarize			
Field	**Operator**	**Value**	**Outcome**
Training Title	Is equal to	Enter the training title	Select this filter to limit report results to a specific learning object.
Desired OU's	Various	Various	Select this filter to limit report results to a single or multiple OUs or choose not to use a filter if you want to review all results.

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To sort fields on the report, the fields must be added to the **Sort** tab. Fields are added by dragging and dropping fields from the **Fields** panel to the blank sort boxes on the Sort tab.

You can also add fields by clicking the name of the field in the **Report Preview** panel, which automatically places the field in the next available sort box, up to the maximum of four fields. Once you have reached the maximum number of sorted fields, an additional field cannot be added until at least one field is removed from the Sort tab.

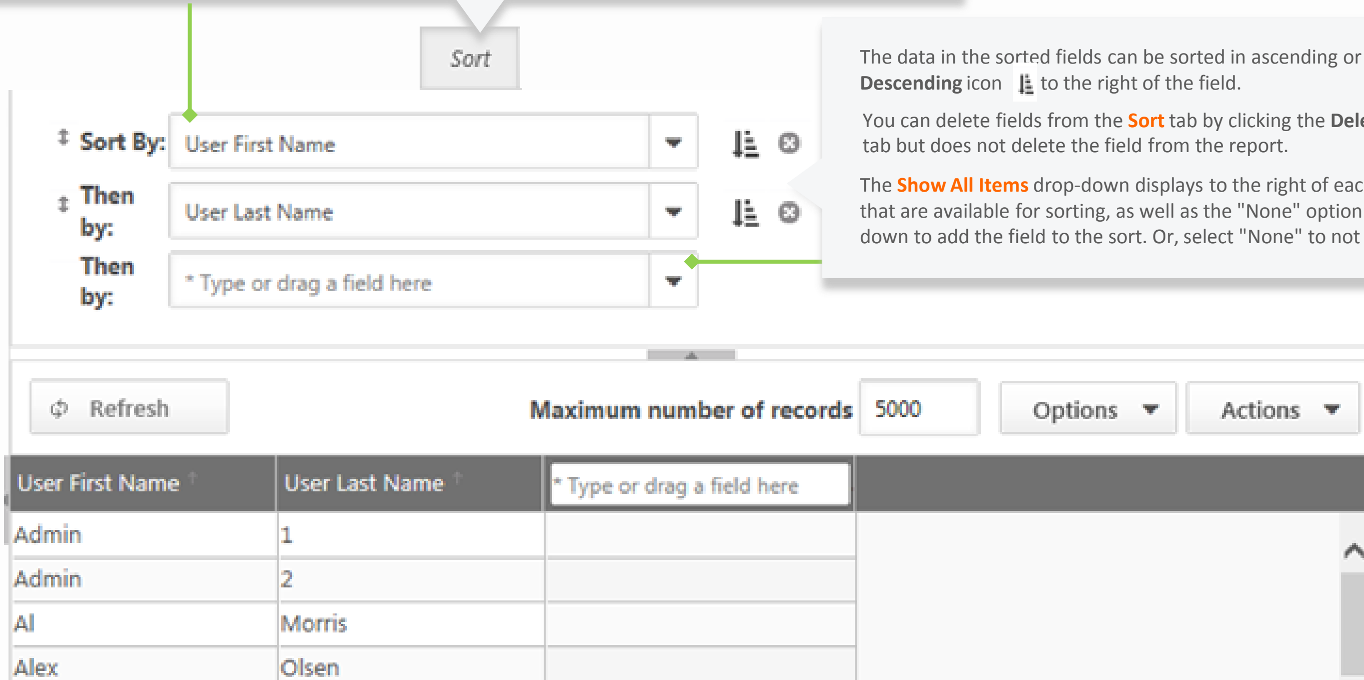
If multiple fields are added to the **Sort** tab, you can define the sort order by dragging and dropping the fields into the desired order on the tab.

Each sort row in the tab can only contain one field.

Note: *Columns can also be sorted within the report preview panel.*

The Sort tab enables you to define the sort order of the fields you selected for the report. By sorting the report fields, you can define which column displays first, and so forth, in the report output.

The report can only be sorted into a maximum number of four fields. Once the maximum number is reached, the report cannot be sorted into additional fields.



The data in the sorted fields can be sorted in ascending or descending order by clicking the **Ascending or Descending** icon to the right of the field.

You can delete fields from the **Sort** tab by clicking the **Delete** icon. This deletes the field from the **Sort** tab but does not delete the field from the report.

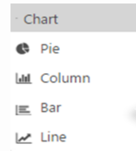
The **Show All Items** drop-down displays to the right of each sort box. Clicking the drop-down shows all fields that are available for sorting, as well as the "None" option. You can select one of the fields from the drop-down to add the field to the sort. Or, select "None" to not sort the report by additional fields.

CUSTOM REPORTING

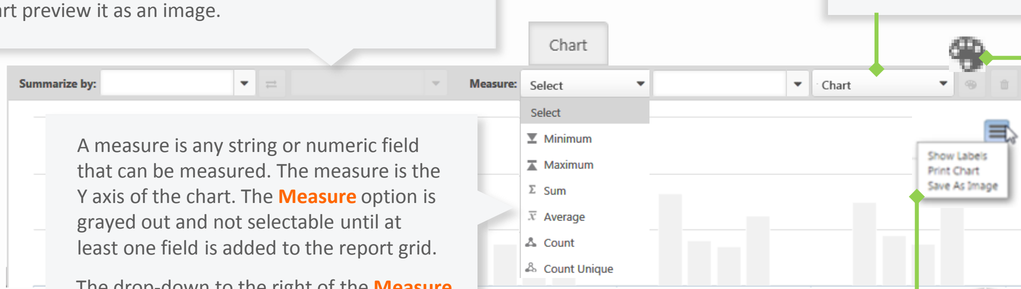
The Chart tab allows users to create charts for custom reports and is available for all custom report types.

The chart that displays on the **Chart** tab is a preview of the chart that will display in the report output. The preview displays data for up to 1,000 records and displays and updates when the user clicks the **Refresh** button. The chart appearance will vary, depending on the number of records used to generate the chart. For instance, in the chart preview, a chart may appear with five columns and five colors.

Multiple chart types are supported in the chart designer. The type of chart that can be created depends on the combination of fields that are added as dimensions and as the measure. The **Chart** type drop-down is grayed out and not selectable until at least one dimension or measure is added to the chart.



Charts can be outputted on their own (without the report data) as a printable version and a .png image. Charts also display when viewing the report in Excel or the print output for the report. The menu in the upper-right corner of the chart allows users to print the chart preview or save the chart preview it as an image.



A measure is any string or numeric field that can be measured. The measure is the Y axis of the chart. The **Measure** option is grayed out and not selectable until at least one field is added to the report grid.

The drop-down to the right of the **Measure** field displays the aggregates. The aggregate is automatically defined by the system when selecting the field to measure, depending on the field type added to the measure option.

The **color palette** allows users to select the color used for color-coding the dimension that appears in the legend. When a chart is first created, the chart will appear in the default palette. Users can update the colors by using the **color palette**. This option is grayed out and not selectable until at least one dimension or measure is added to the chart.

The **chart legend** displays to the right of the chart and provides the color key for up to 50 values for one of the dimensions. The dimension for which the chart displays is determined by the chart type.

Fields can be deselected in the legend by clicking on the color next to the legend field label.

The count or percentage labels for the chart data are hidden by default. To display the labels, click the **Show Labels** option in the chart menu. This shows the labels based on the chart type:

Pie - The labels display the name, count, and percentage for each pie slice.
Column - The labels display the count for each bar.
Line - The labels display the count at each data point in the line.
Bar - The labels display the count for each side bar.

To hide the labels, click the **Hide Labels** option in the options menu drop-down.

Common Charting Examples

Transcript Status

Field	Value
Summary by	Transcript Status
Measure	User ID (or other unique identifier)
Aggregate	Count

Training Status by Location

Field	Value
Summary by	Location then by Transcript Status
Measure	User ID (or other unique identifier)
Aggregate	Count