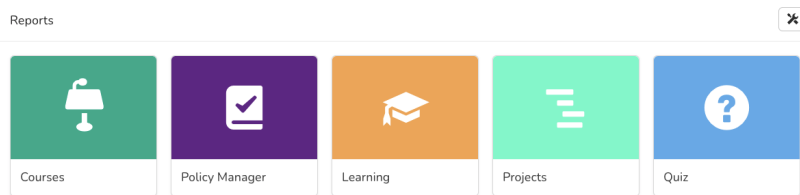


How to build your first report

Archived

⚠ **Warning:** The report application is currently in **beta**, there will be some limited functionality but we would love to hear your feedback.

Step 1: Select which application you wish to build a report.

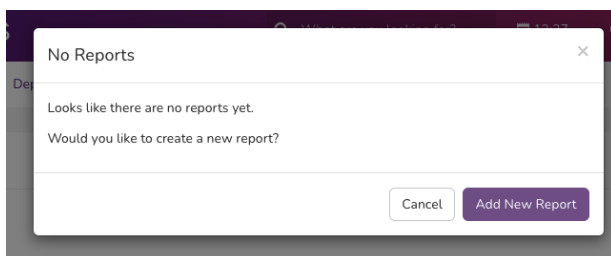


Currently, only the following application is available in the Report application with more application will be supported in the future.

- Courses
- Policy Manager
- Learning
- Quiz
- Project (New in Project 2.0)

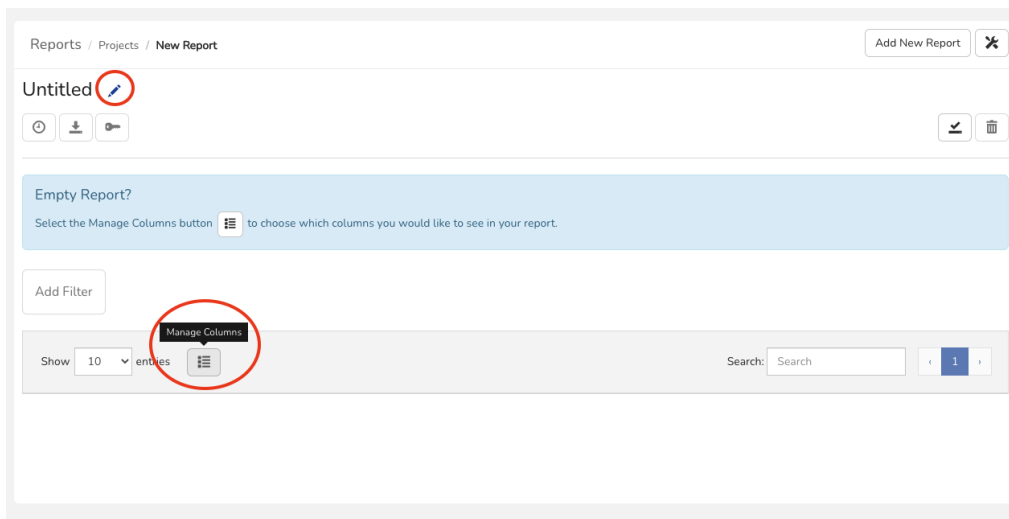
Step 2: Click on Add New Report

if there are existing reports you will be prompted if you wish to make a copy of an existing report, otherwise "Add new Report"



Step 3: Creating Master Report

Name your report and then click on **Manage Column** to select what information you wish to be displayed



On the example below I am creating a report across all projects containing the following:

- Project Name
- Project Status
- Task Name
- Task Assignee
- Task Due Date
- Task Status

📌**Tips:** Please include all possible data you wish to gather here as you can filter the result at a later step

Manage Columns

▼ ☐ Projects

- ☒ Project Name
- ☐ Project Code
- ☐ Project Description
- ☐ Project Is Template
- ☒ Project Status
- ☐ Project Date Created *f*
- ☐ Project Date Modified *f*

➤ ☐ Project Creator

➤ ☐ Project Last Edited By

▼ ☐ Tasks

☒ Task Title

▼ ☐ Task Assignee

- ☐ User Id
- ☐ Username
- ☒ Full Name
- ☐ Firstname
- ☐ Surname
- ☐ Email Address
- ☐ Company
- ☐ Job Title
- ☐ User Status
- ☐ Last Time Login
- ☐ Extranet
- ☐ Metadata
- ☐ # Tasks Completed *f*
- ☐ # Tasks Todo *f*
- ☒ Task Due Date *f*
- ☒ Task Status
- ☐ Task Priority

Save your report by clicking "Save" icon" and **Save as New Master Report**



Step 4: Creating filtered report

Once you have saved your master report you can now add a filter to fine-tune the result.

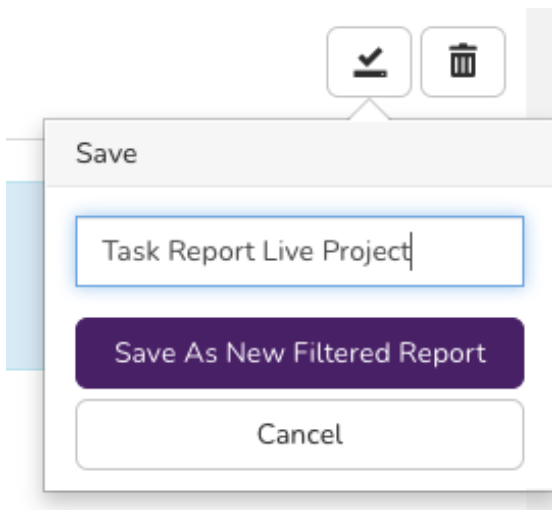
Here is an example that you may want to only include **Project with Status = Live** on your report and ignore Draft and Archive.

Project Status:

- Draft = 1
- Live = 2
- OnHold = 3
- Archived = 4

The screenshot shows a user interface for creating a filtered report. At the top, there is a green pill-shaped button that says 'Filtered by Project Status' with a close 'X' icon. To its right is a white button with a grey border that says 'Add Filter'. Below these is a modal window titled 'Edit Filter'. Inside the modal, there is a dropdown menu currently showing 'Project Status'. Below the dropdown, the text 'View results that are:' is followed by three buttons: '<', '>', and '='. The '=' button is highlighted. Below these buttons is a text input field containing the number '2'. At the bottom of the modal are two buttons: a purple 'Update Filter' button and a white 'Cancel' button with a grey border.

You can then save this as New Filtered Report for easy access later.

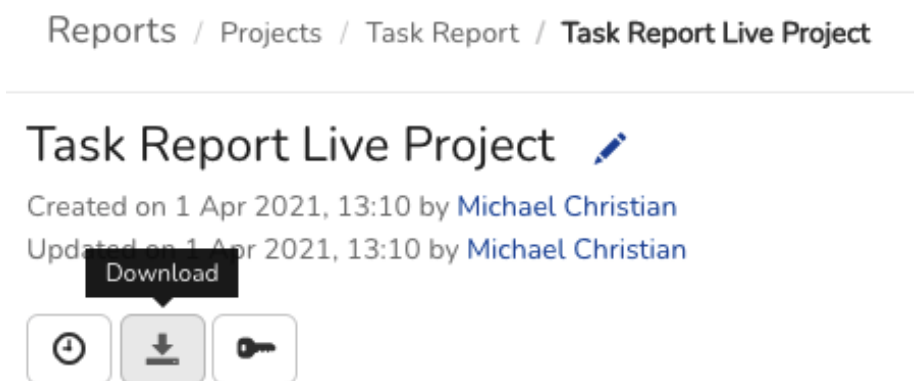


Optional: Adding Filter: Project Task Status

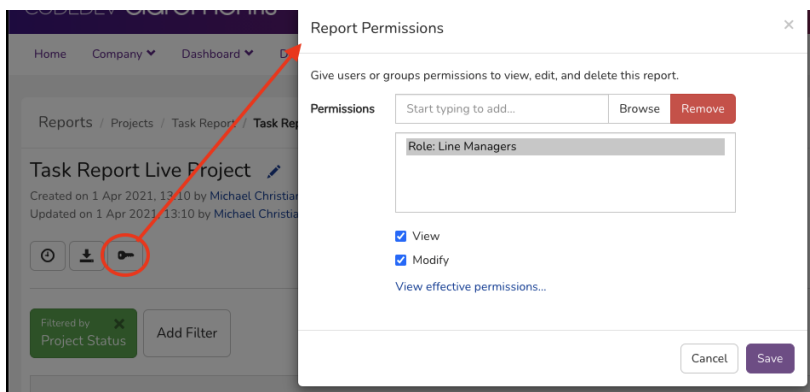
- Incomplete = -1
- Complete = -2

Step 5: Share and Downloading report

Once you have created your report you can then download



or **Share** it via permission so that other team member can also access the same report from Report app



Last modified on 30 January 2023 by Veronica Kim

Created on 1 April 2021 by Michael Christian