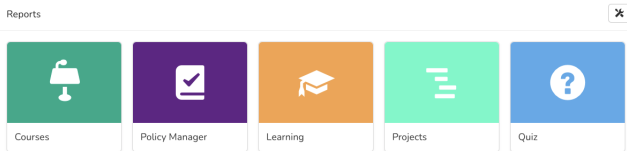


How to build your first report

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.

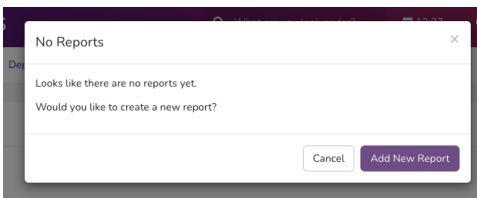


Currently, only the following application is available in the Report application with more application will be supported in the future.

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

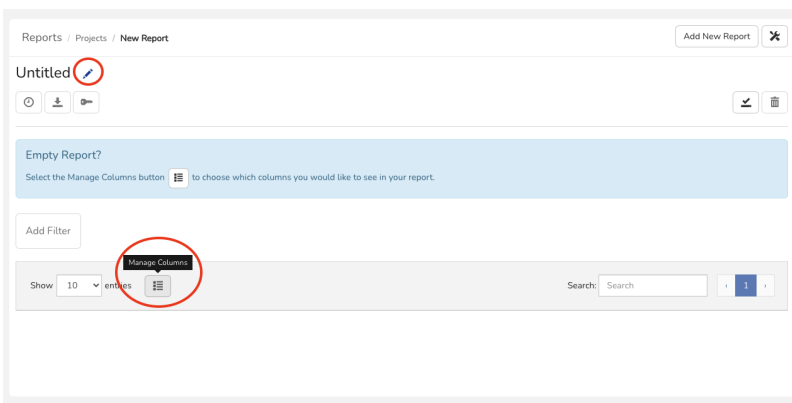
Step 2: Click on Add New Report

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**



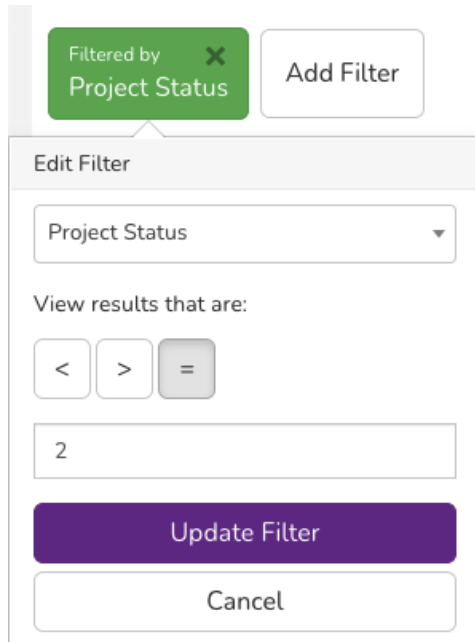
Step 4: Creating filtered report

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

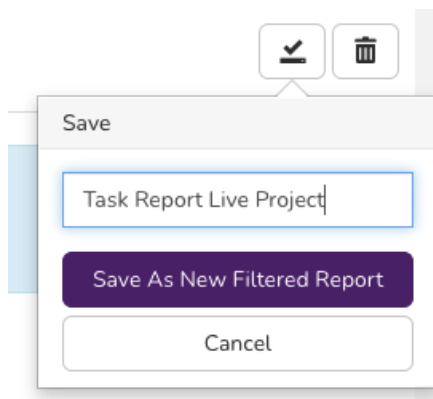
Here is an example that you may want to only include **Project with Status = Live** on your report and ignore Draft and Archive.

Project Status:

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



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

Task Report Live Project

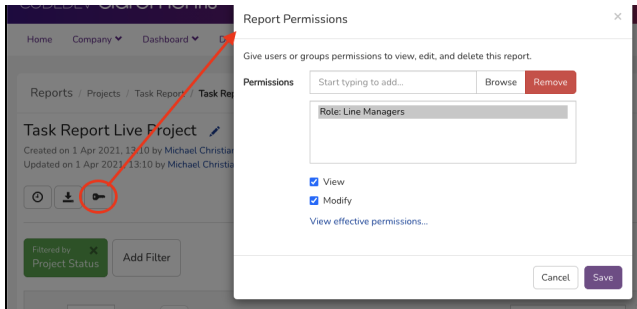
Created on 1 Apr 2021, 13:10 by [Michael Christian](#)

Updated on 1 Apr 2021, 13:10 by [Michael Christian](#)

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](#)