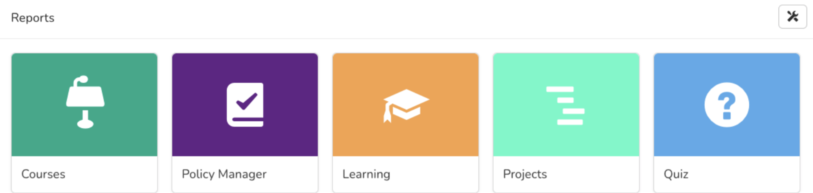
Link to article: https://discover.claromentis.com/knowledgebase/articles/797

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.

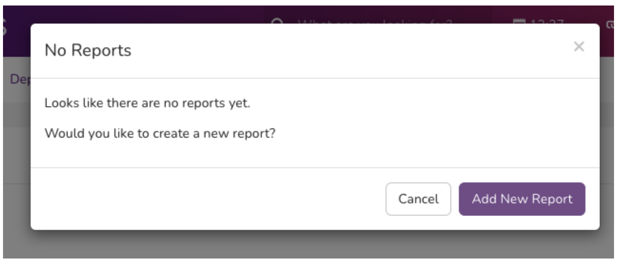


Currently, only the following application is available in the Report application with more application will be supported in the future.

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

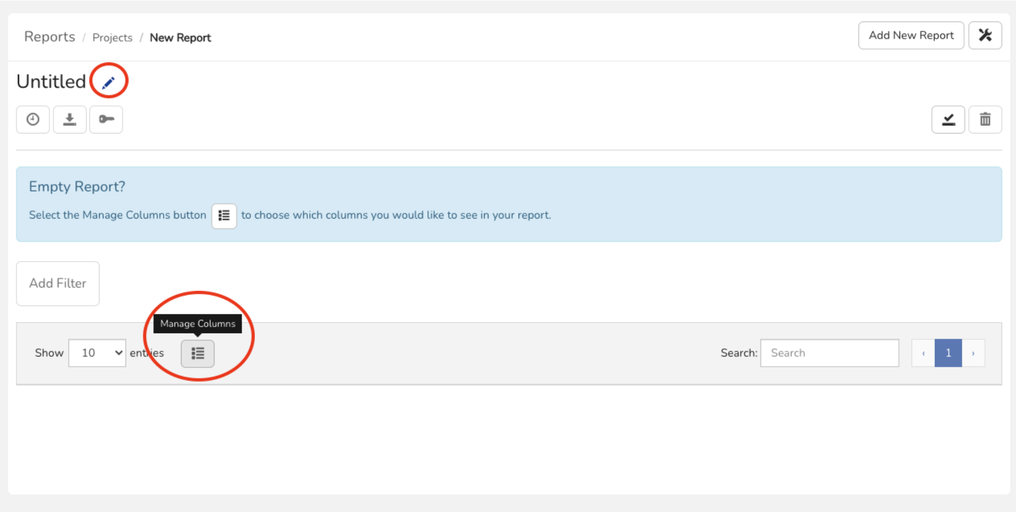
Step 2: Click on Add New Report

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

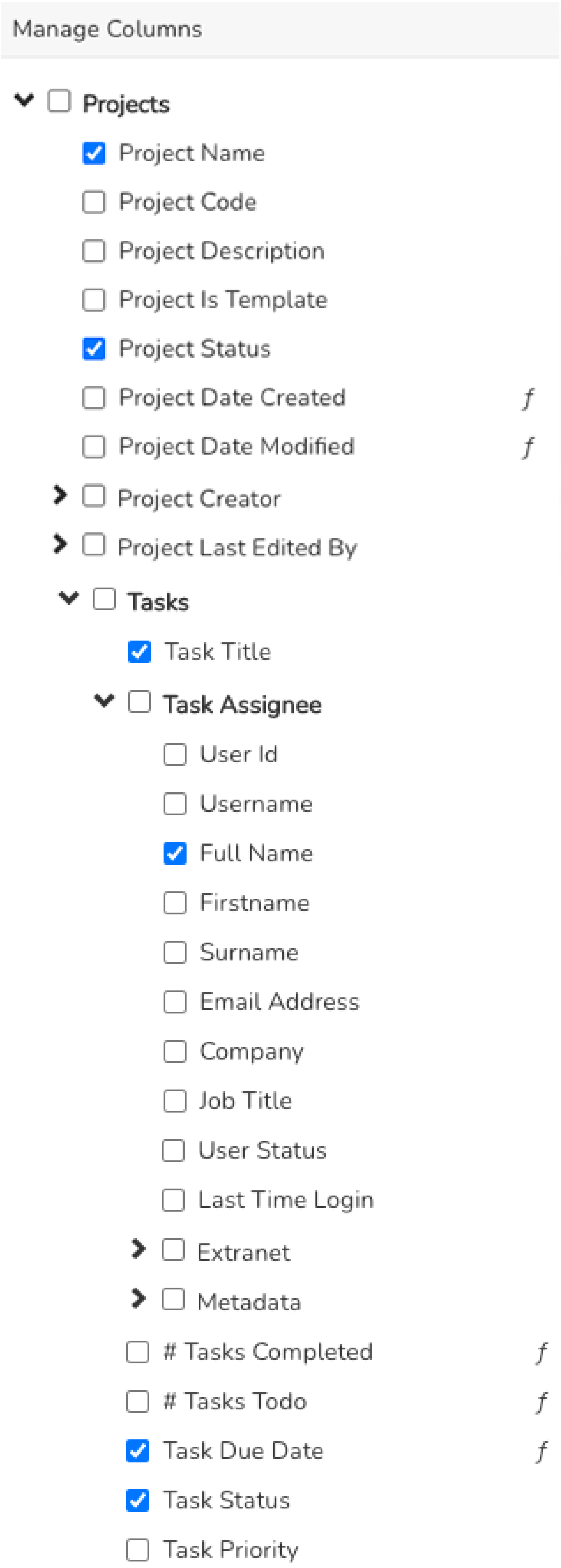
Name your report and then click on **Manage Column** to select what information you wish to be displayed



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



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

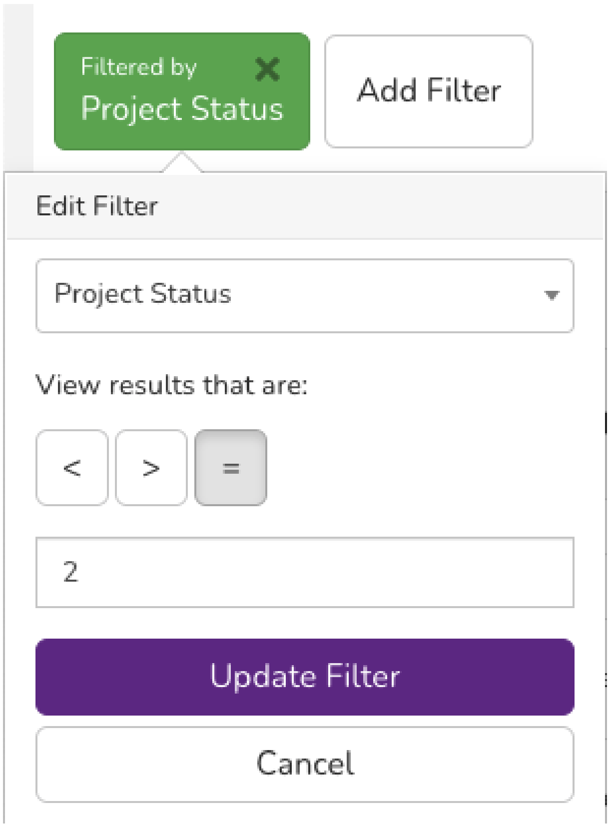
Step 4: Creating filtered report

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

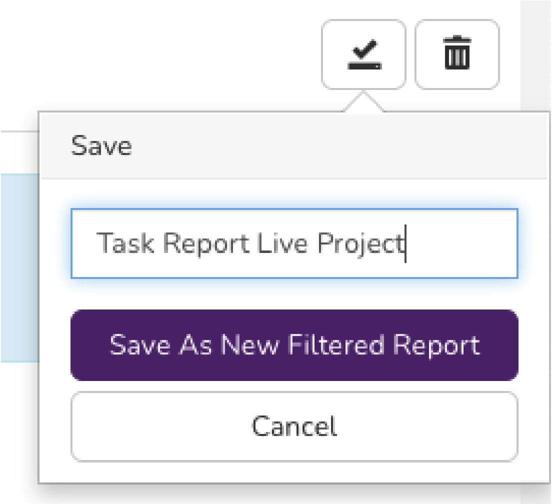
Here is an example that you may want to only include **Project with Status = Live** on your report and ignore Draft and Archive.

Project Status:

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



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

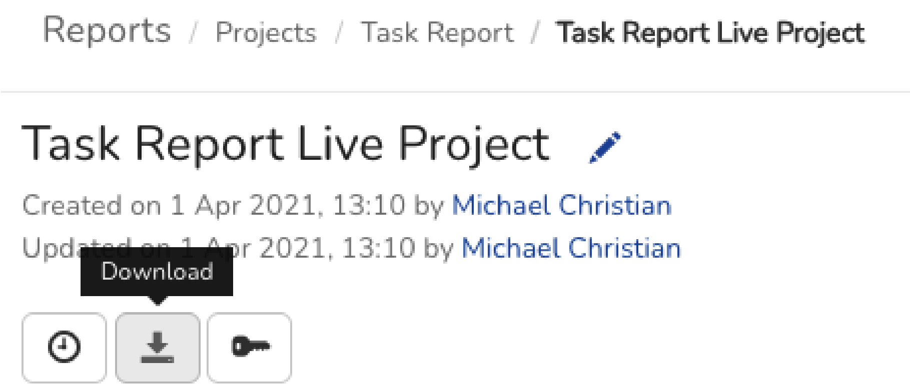


Optional: Adding Filter: Project Task Status

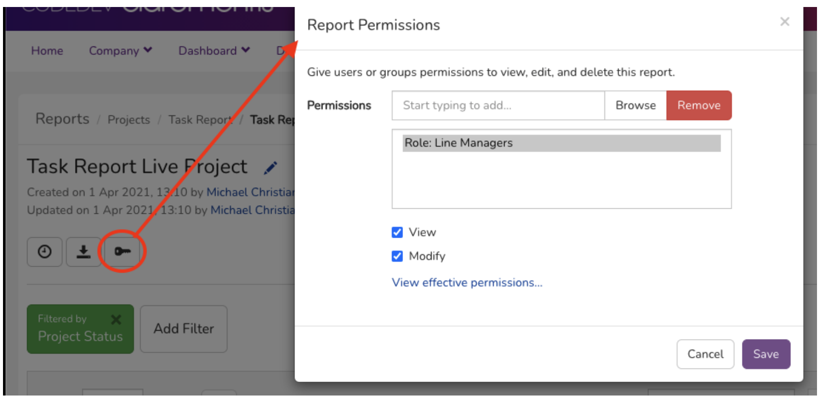
- Incomplete = -1
- Complete = -2

Step 5: Share and Downloading report

Once you have created your report you can then download



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