



Custom Reports

Introduction

In the Reports application, you can create your own custom reports. This article will provide an overview of how you can build and save a custom report for the following applications - Projects, Policy Manager, Courses, Learning, Quiz.

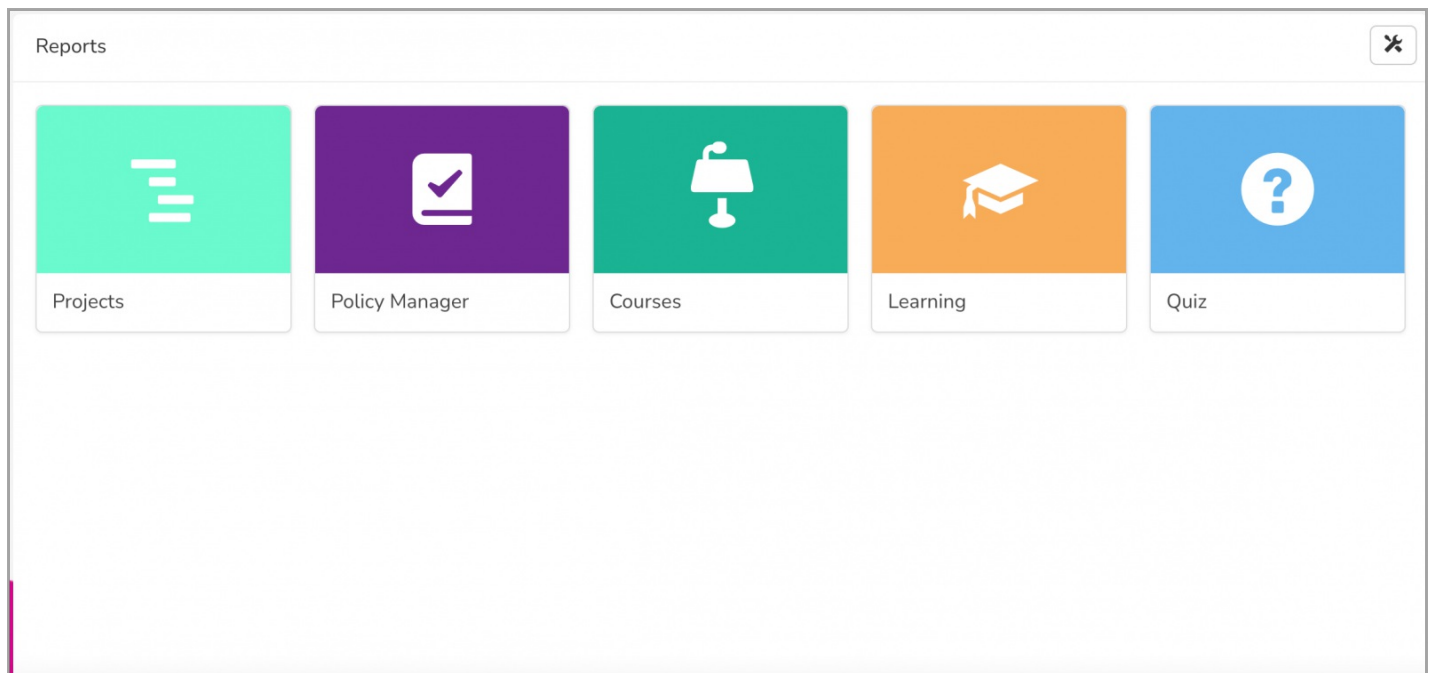
We will cover the following areas:

- [Accessing the reports tool](#)
- [Adding custom reports](#)
- [Building custom reports](#)
- [Report columns](#)
- [Saving custom reports](#)

Please note: Admin permissions will need to be granted in order to access the Reports application. For more information, please check out our guide [here](#).

Accessing the reports tool

Head to **Application > Reports** and select the application you wish to create a report on.



Adding custom reports

On the landing page, you will be presented with a list of all existing reports. With the correct permissions, you will also see the option to

Add New Report

Reports / Projects Add New Report ✕

Name	Owner	Last Modified	Next Schedule
> HR Projects	Claromentis Administrator	26 Apr 2021, 15:56	

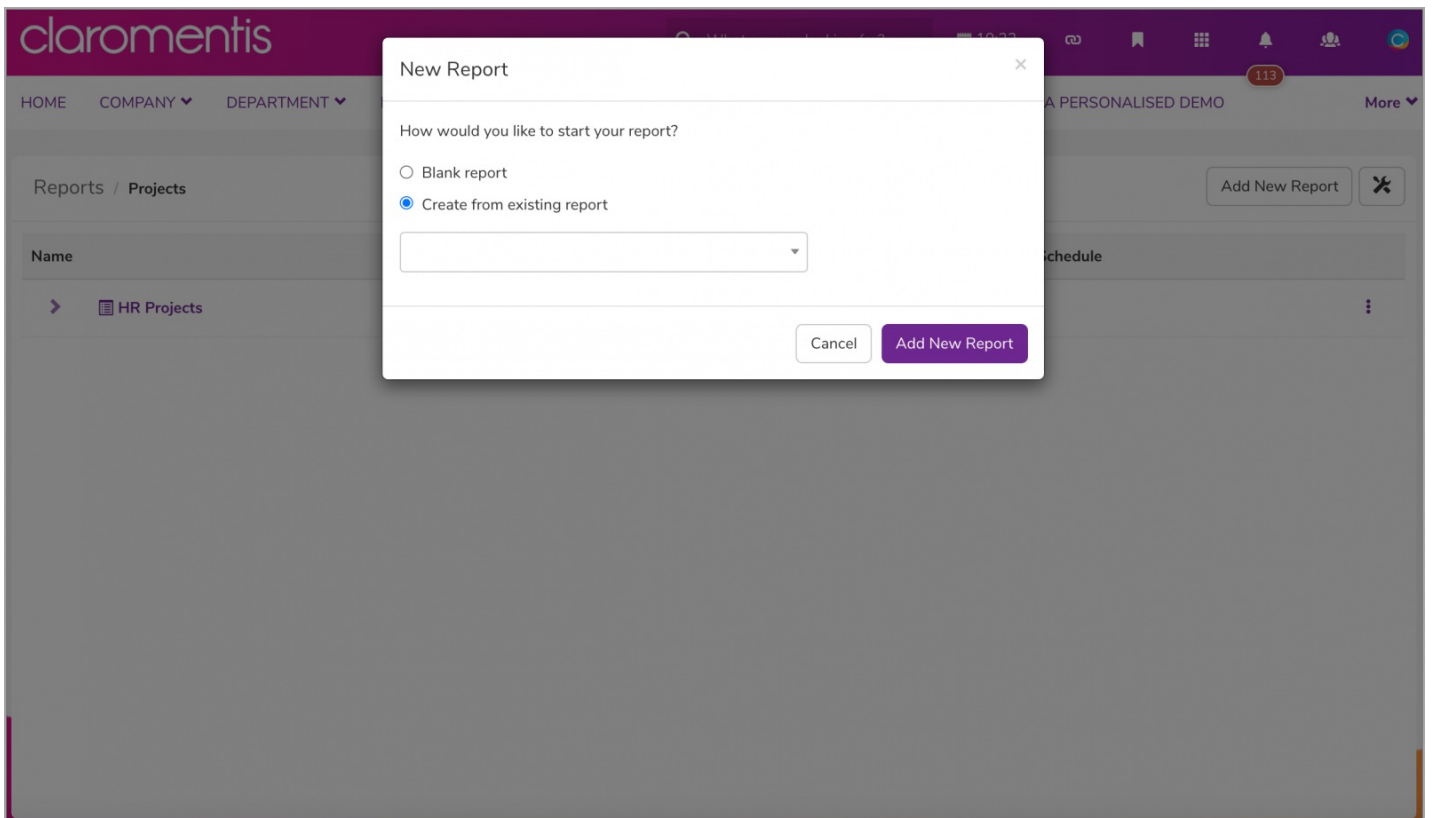
Reminder: If you do not see the option to create a new report, please check with your administrator that you have the permission needed to do so.


You can choose to (1) create a new report from scratch or (2) copy from an existing one.

The screenshot shows a 'New Report' modal dialog box overlaid on the 'Reports / Projects' page. The dialog contains the following text and elements:

- Title: New Report
- Question: How would you like to start your report?
- Option 1: Blank report
- Option 2: Create from existing report
- Buttons: Cancel, Add New Report

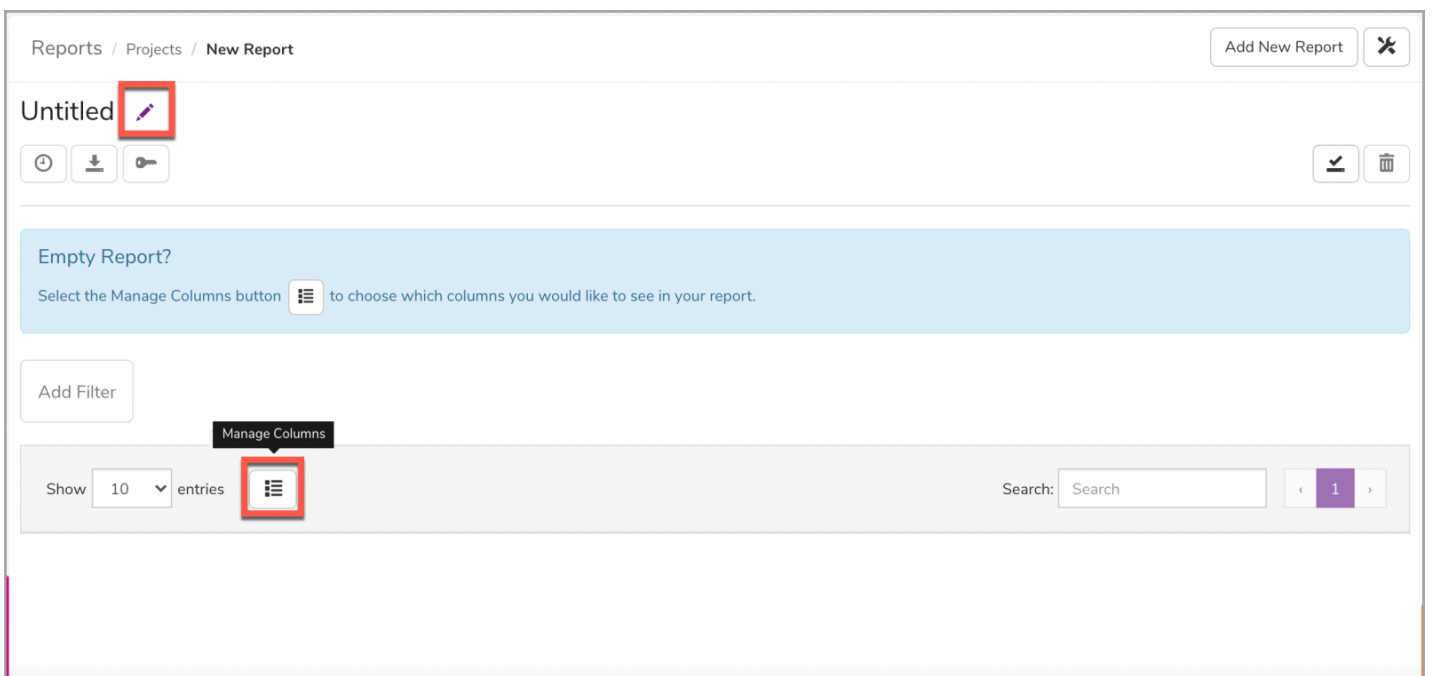
To create from an existing report, simply select which report you would like to copy from.



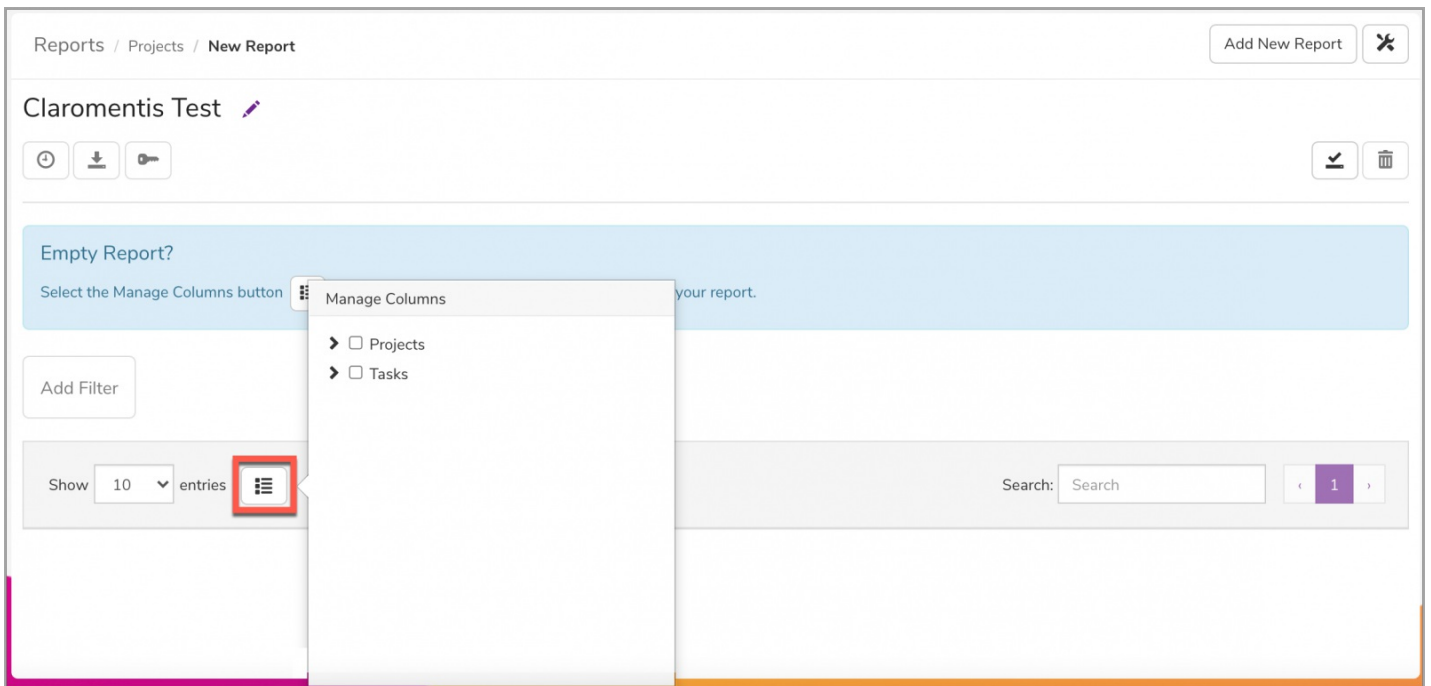
Once the option has been selected, you can begin building the report by clicking 

Building custom reports

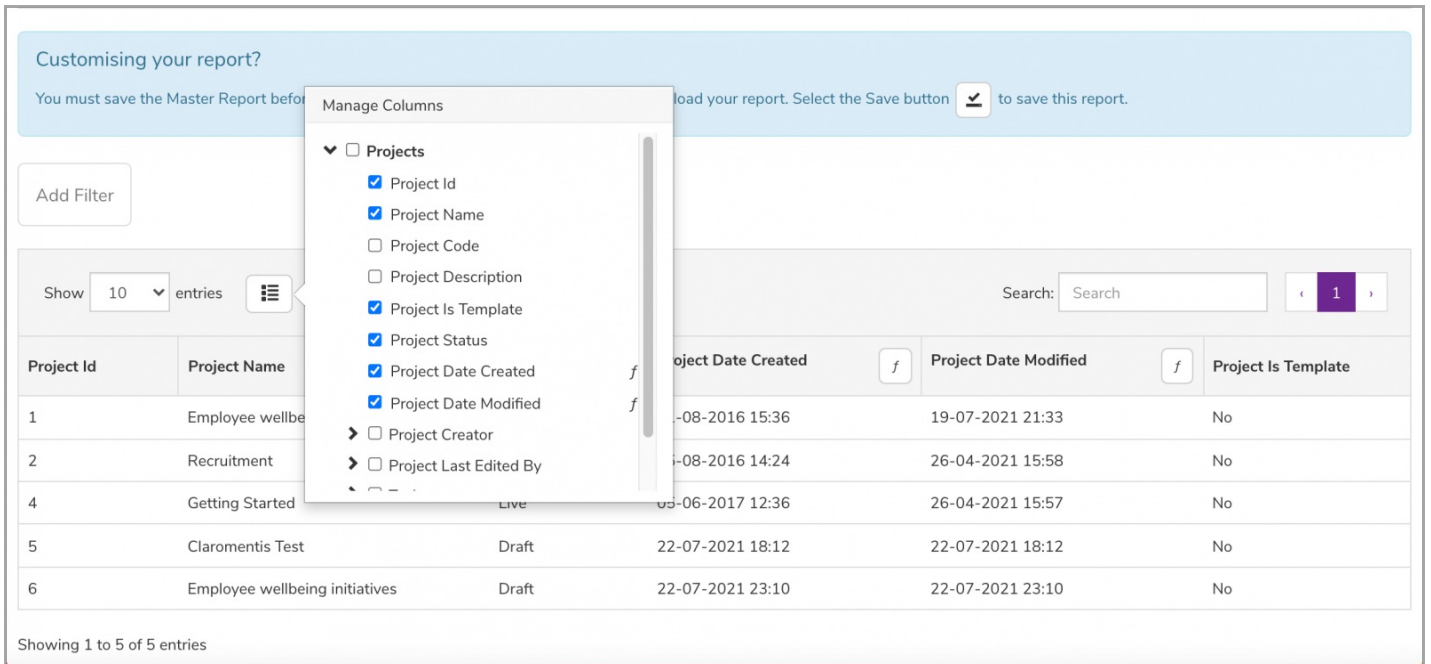
To start, you will be required to define the custom report (1) **Title** and (2) **Manage Columns**.



The **Manage Columns** option will display all available columns you can add.



Use the drop-down arrow to view nested columns and tick the columns you want to add.



Each column will be added in the order they are selected. Use the drag & drop feature (on column titles) to re-order columns as needed.

Please note: The maximum number of columns selectable is 64

Column elements

Each application has different columns to select from.

Projects columns

Metrics	Description
Project Id	Unique identifier of Project

Metrics	Description
Project Name	Full title of Project
Project Code	Unique identification code for Project
Project Description	Description of Project
Project Is Template	Project is a template ('Yes') or ('No')
Project Status	Current status of Project
Project Date Created	Date & time when Project was created
Project Date Modified	Date & time when Project was last modified

Project Creator	Complete user details of creator of Project
Project Last Edited By	Complete user details of last editor of Project
User Id	Unique identifier of User
Username	Username of User
Full Name	First and surname of User
Firstname	First name of User
Surname	Surname of User
Email Address	Email address of user
Company	Name of company
Job Title	Full job title of User
User Status	Current account status
Last Time Login	Last time a User was logged in (in hours, days, months, or years)

Task Title	Full title of task within a Project
Task Assignee	Name of User assigned to a task
# Tasks Completed	Number of tasks completed within Project
# Tasks Todo	Number of pending tasks within Project
Task Due Date	Date when task is due for completion
Task Status	Current status of task
Task Priority	Current priority of task
Task List	List of tasks within a Project

Metadata	Existing metadata in Project
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Policy Manager columns

Metrics	Description
Policy Id	Unique identifier of Policy
Reference	Reference number of Policy
Title	Full title of Policy
Description	Description of Policy
Policy Version	The current version of Policy
Policy Stage	The current stage of Policy
Recalled?	Policy recalled ('Yes' or ('No')
Notified?	Policy review notification sent ('Yes' or ('No')
Archived?	Policy archived ('Yes' or ('No')
Policy Type	Type of Policy
Stage Changed	Date when status of Policy was last changed
Expiry Date	Date when Policy is set to expire
Review Date	Date when Policy is due for review
Created Date	Date & time when Policy was created
Modified Date	Date & time when Policy was last modified

Asset Version	Current version of a policy asset
Asset Type	Type of asset (i.e. File, Page, Weblink)
Asset Stage	Current status of a policy asset
Approval Stage	Current approval status of a policy asset
Approved	Policy approved ('Yes' or ('No')
Date Approved	Date & time when policy asset was approved
Acceptance Count	Number of user acceptances recorded in Policy

Policy Creator	Complete user details of creator of Policy
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Policy Author	Complete user details of author of Policy
User Id	Unique identifier of User
Username	Username of User
Full Name	First and surname of User
Firstname	First name of User
Surname	Surname of User
Email Address	Email address of User
Company	Name of company
Job Title	Full job title of User
User Status	Current account status
Last Time Login	Last time a User was logged in (in hours, days, months, or years)

Extranet Id	Unique identifier of extranet
Name	Name of extranet
Description	Description of extranet

Metadata	Existing metadata in Policy Manager
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Categories	Category of policy
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Courses columns

Metrics	Description
Course Id	Unique identifier of Course
Title	Full title of Course
Status	Current status of Course
Summary	Summary of Course
Duration	Expected duration of Course
Description	Description of Course
Prerequisite	Required prerequisite attached to Course
Qualification Code	Qualification code of Course
Valid For	Validity value of Course

Validity Type	Type of validity used (i.e. Months, Years)
Created Date	Date & time when Course was created
Modified Date	Date & time when Course was last modified
Training Record?	Course recorded in training record ('Yes) or ('No')

Module Id	Unique identifier of Module
Title	Full title of Module
Status	Current status of Module
Description	Description of Module
Note	Note attached to Module
Duration	Expected duration of Module
Created Date	Date & time when Module was created
Modified Date	Date & time when Module was last modified
Valid For	Validity value of Module
Validity Type	Type of validity used (i.e. Months, Years)
Reminder (days)	Days set for reminder notification if User(s) has not yet completed module
Length (minutes)	Expected length of Module
Total	Total number of Module(s) in Course

Owner	Complete user details of owner of Course or Module
Modified By	Complete user details of last editor of Course or Module
Created By	Complete user details of creator of Course or Module
Tutor	Complete user details of Module tutor
User Id	Unique identifier of User
Username	Username of User
Full Name	First and surname of User
Firstname	First name of User
Surname	Surname of User

Email Address	Email address of User
Company	Name of company
Job Title	Full job title of User
User Status	Current account status
Last Time Login	Last time a User was logged in (in hours, days, months, or years)

Category Id	Unique identifier of Course category
Name	Full name of category
Created Date	Date & time when category was created
Modified Date	Date & time when category was last modified

Course User Audits	Complete user details of Course audit
Audit Id	Unique identifier of Course audit
Status	Current status of audit (i.e. Enrolled, Completed)
Date Enrolled	Date & time when User enrolled on Course
Date Completed	Date & time when User completed Course

Module User Audit	Complete user details of Module audit
Status	Current status of Module (i.e. Enrolled, Completed)
Date Enrolled	Date & time when User enrolled on Module
Date Completed	Date & time when User completed Module
Score	Complete score of Module
Time Accessed	Number of times User accessed module
Last Access Date	Date & time when User last accessed module

Category Id	Unique identifier of Module category
Name	Full name of category
Created Date	Date & time when category was created

Modified Date	Date & time when category was last modified
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Tutors Expertise	Expertise of tutors in module
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SCORM Attempt	Complete details of SCORM attempt
Attempt	Number of attempts taken in SCORM
SCORM Type	Type of SCORM used (i.e. 1.2)
Completed	SCORM completed ('Yes) or ('No')

SCORM details	Complete details of SCORM
Best Score	Highest score recorded in SCORM
Points	Number of points recorded in SCORM
Time Taken	Time taken to complete SCORM
Attempts	Number of attempts taken in SCORM

Learning columns

Metrics	Description
Record Id	Unique identifier of LMS Record
Record Type	Type of LMS Record
Title	Full title of Training Record
Description	Description of LMS Record
Record Date	Date & time LMS Record was recorded
Provider	Provider of LMS Record
Created Date	Date & time LMS Record was created
Total Records	Total number of LMS Record(s)

Record User	Complete user details of User
Record Added By	Complete user details of creator of record
User Id	Unique identifier of User
Username	Username of User

Full Name	First and surname of User
Firstname	First name of User
Surname	Surname of User
Email Address	Email address of User
Company	Name of company
Job Title	Full job title of User
User Status	Current account status
Last Time Login	Last time a User was logged in (in hours, days, months, or years)

Certificate Id	Unique identifier of training certificate
Title	Full title of training certificate
Valid From	Start date defining the period of validity of training certificate
Valid To	End date defining the period of validity of training certificate
License	License number of training certificate
Url	Online Certificate URL
Created Date	Date & time when training certificate was created
Total Certificates.	Total number of training certificate(s)

Code	Qualification code of LMS Record
Description	Description of qualification code
Total Codes	Total number of LMS code(s)

Path Id	Unique identifier of Learning Path
Title	Full title of Learning Path
Description	Description of Learning Path
Pass Mark	Minimum pass mark attached to Learning Path
Status	Current status of Learning Path
Created Date	Date & time when Learning Path was created
Deadline (days)	Days set to complete Learning Path
Total	Total number of Learning Path(s)
Enrolment Id	Unique identifier of Learning Path enrolment

Date Enrolled	Date & time when Learning Path was enrolled
Date Completed	Date & time when Learning Path was completed
Last Updated	Date & time when Learning Path was last updated
Notes	Note attached to Learning Path
Total Enrolments	Total number of Learning Path enrolment(s)

Step Id	Unique identifier of Learning step
Title	Full title of Learning step
Description	Description of Learning step
Type	Type of Learning step (i.e. Mandatory, Non-Mandatory, or Further Learning)
Points	Points attached to Learning step
Created Date	Date & time Learning step was created
Total	Total number of Learning step(s)

Audit Date Completed	Date & time when completed Learning Path
Total Audits	Total number of Learning Path audits

Quiz columns

Metrics	Description
Quiz Title	Full title of quiz
Description	Description of quiz
Pass Percentage	Minimum passing mark percentage
Status	Current status of quiz
Created Date	Date & time when quiz was created
Total	Total number of quiz

Creator	Complete user details of Quiz creator
User Id	Unique identifier of User
Username	Username of User
Full Name	First and surname of User
Firstname	First name of User

Surname	Surname of User
Email Address	Email address of User
Company	Name of company
Job Title	Full job title of User
User Status	Current account status
Last Time Login	Last time a User was logged in (in hours, days, months, or years)

Question Text	Full text of Quiz question
Description	Description of Quiz question
Points	Points attached to Quiz
Created Date	Date & time when Quiz question was created

Attempt Number	Number of Quiz attempt
Created Date	Date & time when Quiz attempt was created
Completed Date	Date & time when Quiz attempt was completed
Last Access Date	Date & time when Quiz attempt was last made
Passed	Quiz successfully passed ('Yes) or ('No')
Best	Best attempt ('Yes) or ('No')

Answers Created Date	Date & time when Quiz answer was created
Total Answers	Total number of Quiz answer(s)




Properties	Complete details of Quiz properties
Correct	Total number of Quiz answer(s)
Score	Question answered correctly ('Yes) or ('No')
Time Taken	Time taken to answer Quiz question
Question Answer	Correct answer to Quiz question
Question Text	Full text of Quiz question
Response	Response that User selected



Saving custom reports

To save the report, select **Save As New Master Report**


Reports / Projects / **New Report** Add New Report ✕

Claromentis Test



  


Empty Report?

Select the Manage Columns button  to choose which columns you would like to see in your report.



Where have my columns gone?


By choosing a function  or a column with a fixed function  you are grouping your data by a set of columns. Some of these columns no longer apply to the group, and so have been made unavailable.

Add Filter

Show 10 entries 

Search: 1




Project Id	Project Name	Project Code	Project Description	Project Is Template	Project Status	Project Date Created 	Project Date Modified 
1	Employee wellbeing initiatives	CLA-01	A project to discuss and create some initiatives to improve employee wellbeing	No	Live	22-07-2021 23:10	22-07-2021 23:10
2	Recruitment	CLA-02	How we handle the upcoming recruitment drive	No	Live	15-08-2016 14:24	26-04-2021 15:58
4	Getting Started	GS	PROJECT TO GET STARTED	No	Live	05-06-2017 12:36	26-04-2021 15:57
5	Claromentis Test	CTT	PROJECT TO GET STARTED	No	Draft	22-07-2021 18:12	22-07-2021 18:12



You can now **Download** the data as a CSV by selecting the  icon

Reports / Projects / **Claromentis Test** Report Claromentis Test was saved


Claromentis Test

Created on 13 Sep 2021, 21:30 by Claromentis Administrator
Updated on 13 Sep 2021, 21:31 by Claromentis Administrator



  

Add Filter

Show 10 entries 

Search: 1

Project Id	Project Name	Project Code	Project Description	Project Is Template	Project Status	Project Date Created 	Project Date Modified 
1	Employee wellbeing initiatives	CLA-01	A project to discuss and create some initiatives to improve employee wellbeing	No	Live	11-08-2016 15:36	19-07-2021 21:33




You can also **Share** the report to other users via permissions by selecting the  icon



Reports / Projects / Claromentis Test

Report Claromentis Test was saved


Claromentis Test

Created on 13 Sep 2021, 21:30 by Claromentis Administrator
Updated on 13 Sep 2021, 21:31 by Claromentis Administrator

Add Filter

Show 10 entries 

Search: 1

Project Id	Project Name	Project Code	Project Description	Project Is Template	Project Status	Project Date Created <small>f</small>	Project Date Modified <small>f</small>
1	Employee wellbeing initiatives	CLA-01	A project to discuss and create some initiatives to improve employee wellbeing	No	Live	11-08-2016 15:36	19-07-2021 21:33

Every time the report is opened it will run and any new data will be included ready for download and/or further analysis in external programs.

Last modified on 6 December 2023 by [Hannah Door](#)

Created on 13 September 2021 by [Veronica Kim](#)

Tags: [projects](#), [reports](#), [user guide](#), [course](#), [learning](#), [policy manager](#), [quiz](#)