

*Learn*Connect

ADVANCED REPORTING

Introduction.....	3
Purpose.....	3
Audience.....	3
Supporting documents.....	3
Creating a complex report.....	4
Getting started	4
Let's create a 'Not Completed Enrolments' report	5
Adding the required filters	5
Select your columns	11
Set your column order and run the report.....	12
Let's view the report page.....	13
Analysing the results	14
Save the report.....	15
Appendices	16
Appendix 1.....	16

Introduction

Hello and welcome to LearnConnect help.

LearnConnect offers powerful reporting functionality to help you keep track of a vast array of learning activities in your organisation.

This guide has been created to help you create complex custom reports in LearnConnect.

Purpose

The purpose of this guide is to:

- Follow on as the next logical step from the Introduction to Reporting guide
- Show you the process for creating a report with multiple filters
- Show you how to change filter parameters for saved reports
- Show you how to schedule saved reports.

Audience

This guide is designed for anyone with Administrator privileges who has experience creating reports in LearnConnect.

Supporting documents

Definitions of an extensive list of LearnConnect reporting terms can be found in the Custom Reports Glossary of Terms.

The Introduction to Reporting guide provides foundation knowledge for this document. If you are new to creating custom reports in LearnConnect, it is strongly recommended that you refer to that guide before beginning this one.

Creating a complex report

Getting started

In the Introduction to Reporting guide, we created an Enrolment report with a single filter to only show results from a particular Catalogue Item.

New Report (Unsaved)

This report has not yet been saved.

Refine ReportSave Report

Export as Excel format (.xlsx)

Export

Filters

Field	Operator	Value
Catalogue Item	=	The SAFE Files Privacy

Search

Full Name	Catalogue Item	Enrolment Status	Completed date
A A	The SAFE Files Privacy	Completed	20/05/2014 10:58 AM
B B	The SAFE Files Privacy	Incomplete	
Barry Jones	The SAFE Files Privacy	Not Attempted	
Blake Tester	The SAFE Files Privacy	Not Attempted	
Bob Simple	The SAFE Files Privacy	Not Attempted	

We now want to expand upon that and create a more targeted report with some additional filters that expand and/or refine your report results.

For this example we want to report on users who:

1. For any of three courses (Catalogue Items) – The SAFE Files Privacy, The SAFE Files Equal Opportunity in Employment and The SAFE Files Workplace Bullying
2. Show a status of Active in LearnConnect
3. Show any Enrolment Status other than Completed (i.e. users who have **not completed** their enrolment in one or more of the above three courses).
4. Were enrolled in these courses between 1 July 2013 and 30 June 2014.

Please note: The courses and timeframes listed above are for demonstration purposes only. You may need to amend these to capture actual enrolment data within your organisation as this example configuration may not return any results in your system.

Let's create a 'Not Completed Enrolments' report

If you followed the steps in the Introduction to Reporting guide, you will have a saved report called 'The SAFE Files Privacy Completion'. The report we are about to create is another Enrolment report, but with a lot of additional detail. Although it is possible to build a new report that is based on a previously saved one, we'll start again from the beginning.

In the **New Report** page, select **Enrolment** from the **Report Type** drop-down list. You'll see the page refresh to display the columns that are relevant to that report type.

New Report (Unsaved)
This report has not yet been saved.

Report Type

User

Enrolment

Learning Event Session Attendance

Learning Event Waitlist

Other Learning

Progress

Progress Course

Progress Trackable Document

Test

☒ Active

☐ Groups

☐ Custom Attributes

☐ Dietary Requirements

☐ Group Types

Your statistics

0% enrolments completed

0% average pass mark

0m average time in courses

Recently Viewed

Your badges (0)

Contact us

If you have feedback, please let us know.

Help ⓘ

Contact us ✉

Below the **Report Type** drop-down, you'll notice the **Filters** function. This is where we are going to provide specific instructions to ensure LearnConnect only provides the actual data we're looking for.

Adding the required filters

We'll start by adding the three courses that we want to report on. To do that, we need to set up what's called a 'filter group'.

1. Select the **Add Group** button.

New Report (Unsaved)
This report has not yet been saved.

Report Type

Enrolment

Filters

AND

Add Item

Add Group

2. The **Filter** area has now expanded to include another filter that is slightly indented.

New Report (Unsaved)
This report has not yet been saved.

Report Type

Enrolment

Filters

AND Add Item Add Group Delete All Items

Field	Operator	Value	Control
AND			

AND Add Item Add Group Delete Group

In this area we can now begin applying the filters for the three Catalogue Items mentioned previously:

- The SAFE Files Privacy
- The SAFE Files Equal Opportunity in Employment
- The SAFE Files Workplace Bullying.
-

Please note: If you have not delivered any of these courses at your organisation, the report will not return any results. If this is the case, please choose Catalogue Items that are relevant to your organisation and have enrolment history.

3. Select **OR** from the **AND/OR** drop-down list – **OR** tells LearnConnect that you want any of the options within the group, as opposed to **AND**, which tells LearnConnect you want strictly all of the options within the group.

Example: If we take the three catalogue items and apply an **AND** filter, the report will return results only for users who have not completed any of the three courses, i.e. where the user has not completed The SAFE Files Privacy, The SAFE Files Equal Opportunity in Employment **AND** The SAFE Files Workplace Bullying. If we apply the **OR** filter, the report will return results for users who have not completed any one (or more) of the three courses, e.g. where the user has completed The SAFE Files Privacy, but not The SAFE Files Equal Opportunity in Employment **OR** The SAFE Files Workplace Bullying.

4. Select the **Add Item** button to reveal the **Field**, **Operator** and **Value** controls.

Filters

AND Add Item Add Group Delete All Items

Field	Operator	Value	Control ?
OR	Add Item	Add Group	Delete All Items Delete Group
Full Name	=		<input type="checkbox"/> -

5.

6. Let's change the **Field** drop-down to **Catalogue Item**, the **Operator** drop-down to **=** and then select the **Value** list. As well as being a drop-down list, **Value** also includes a text field that you can use to type in a keyword for your course. In this case we'll type in 'privacy' to filter the results to include only Catalogue Items that include this word.
7. **Control** is a handy function that allows us to quickly change the filter (in this example the Catalogue Item, or course title) from within the report results page, so let's check that one too.

Field **Operator** **Value** **Control ?**

Catalogue Item =

privacy

Privacy Policy
Privacy Refresher
The SAFE Files Privacy
The SAFE Files Privacy (2013)
The SAFE Files Privacy (2014)
The SAFE Files Privacy 2.0.0
The SAFE Files Privacy Policy (2013)
The SAFE Files Privacy Policy (2014)
The SAFE Files Privacy Policy 2.0.0
The SAFE Files Privacy Policy 2.0.0

✓

▼ Select Columns

☐ User Details

☒ Full Name

☐ Active

☐ Address Line 1

☐ Address Line 2

☐ Sy

☐ Per

☐ Gr

☐ Po

☐ Manager Username

8. Now we've got the first Catalogue Item in place, it's now time to add the next two in the group. You'll need to select the **Add Item** button again – but now there are two to choose from. As previously mentioned, when a group is added the options relating to the group are indented, so it's the **Add Item** button from the indented group that you want to select.

Filters

AND **Add Item** Add Group Delete All Items

Field	Operator	Value	Control ?
OR	Add Item	Add Group	Delete All Items Delete Group
Catalogue Item	=	The SAFE Files Privacy	✓ -

9. Add each additional Catalogue Item (repeating the process outlined in step 5) until you have added all three.

Filters

AND Add Item Add Group Delete All Items

Field	Operator	Value	Control ?
OR	Add Item	Add Group	Delete All Items Delete Group
Catalogue Item	=	The SAFE Files Privacy	✓ -
Catalogue Item	=	The SAFE Files Equal Opportunity in Employm...	✓ -
Catalogue Item	=	The SAFE Files Workplace Bullying	✓ -

10. Now that the group is complete, we can begin adding new filters using the main **Add Item** button.

Filters

AND Add Item Add Group Delete All Items

Field	Operator	Value	Control ?
OR	Add Item	Add Group	Delete All Items Delete Group
Catalogue Item	=	The SAFE Files Privacy	<input checked="" type="checkbox"/> -

11. The next filter we will add is to ensure that **only active users** are included in the report and all archived users are excluded. Select **Add Item**, then **Active** from the **Field** drop-down list, = from the **Operator** drop-down list, then **Yes** from the **Value** drop-down list.

Filters

AND Add Item Add Group Delete All Items

Field	Operator	Value	Control ?
Active	=	Yes	<input type="checkbox"/> -

12. The next filter ensures users who are showing an enrolment status of **Completed** for any of the Catalogue Items do not appear in the report for that Catalogue Item. Select **Add Item**, then **Enrolment Status** from the **Field** drop-down list, **!= (does not equal)** from the **Operator** drop-down list, then **Completed** from the **Value** drop-down list.

Filters

AND Add Item Add Group Delete All Items

Field	Operator	Value	Control ?
Active	=	Yes	<input type="checkbox"/> -
Enrolment Status	!=	Completed	<input type="checkbox"/> -

13. The next two filters allow us to set the date range for our report results. In this example we want to only see users who were **enrolled** in any of the selected Catalogue Items **within the 2013/14 financial year**.
- a) Select **Add Item**, then **Enrolment Date** from the **Field** drop-down list, and **after** from the **Operator** drop-down list. The **Value** drop-down list now contains two options – the **Const** (constant)/**Param** (parameter) drop-down list and a calendar, or 'date picker'. Because the date range we need is not included in the list of pre-defined parameters, we will select **Const**, then use the date picker to select **30/06/2013** (to give us dates from and including 01/07/2013).
 - b) Select **Add Item**, then **Enrolment Date** from the **Field** drop-down list, and **before** from the **Operator** drop-down list. Under **Value** select **Const**, then use the date picker to select **01/07/2014** (to give us dates up to and including 30/06/2014).
 - c)

Field	Operator	Value	Control
Active	=	Yes	<input type="checkbox"/>
Enrolment Status	!=	Completed	<input type="checkbox"/>
Enrolment Date	after	C... 30/06/2013	<input checked="" type="checkbox"/>
Enrolment Date	before	C... 01/07/2014	<input checked="" type="checkbox"/>

If your filters look like the ones in the above screen image, that means they are now successfully configured. Note that **Control** has been checked for the enrolment date filters – this will allow you to modify the date range on your report results page.

In the next section we will add columns to the report.

The **Select Columns** function allows you to choose which data you want to see in your report. Please see Table 1 on the next page for details about what has been chosen for the example report and why.

<http://help.learnconnect.com.au>

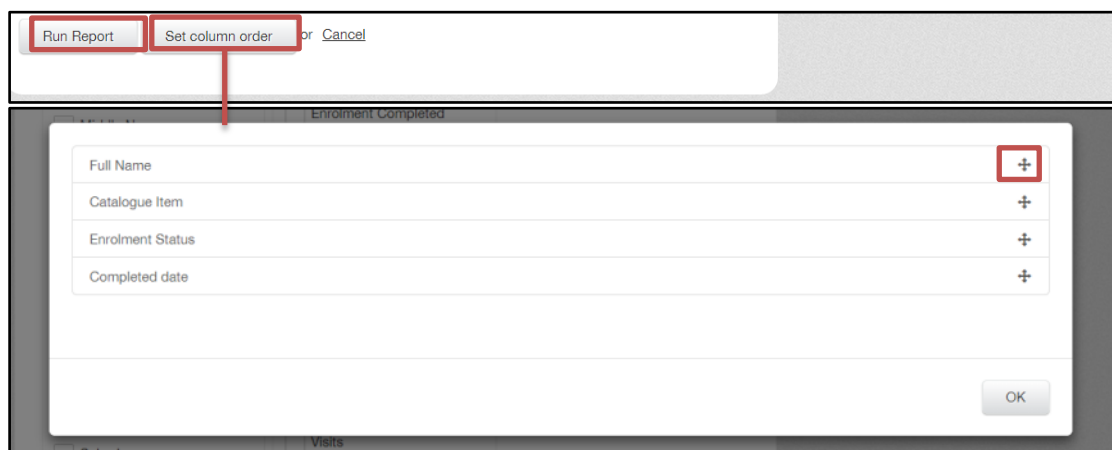
Table 1:

Column	Why?
Full Name	To see the full name of any individual who is yet to complete any one or more of our selected Catalogue Items
Manager Name	To see the name of the user's manager if we wish to follow up with them
Catalogue Item	To see the title of the relevant Catalogue Item
Enrolment Date	To see the date each user was enrolled in the relevant Catalogue Item
Due Date	To see the date each user is/was due to complete the relevant Catalogue Item
Enrolment Status	To see whether or not the user has attempted the relevant Catalogue Item
Business Unit	To see what business unit the user belongs to; for example, if we wish to compare non-completion rates from one business unit to another

Set your column order and run the report

If you wish, you can select the **Set column order** button. This displays a pop-up window that allows you to arrange the order of your report columns – select and drag the cross icon to change the order of your columns, and then select the **OK** button.

When you're ready, select the **Run Report** button.



Let's view the report page

After a few seconds, your report will be generated.

Please note: Because we have selected **Control** for several of the filters, these filters will be visible above the report data. This means you can make adjustments to your existing filters without having to return to the **Create Report** window. Once you have applied any necessary adjustments, select the **Search** button to re-run the report.

Refine Report

Save Report

Export as Excel format (.xlsx)

Export

Filters

Field	Operator	Value
Active	=	Yes
Enrolment Status	!=	Completed
Enrolment Date	after	Co... 30/06/2013
Enrolment Date	before	Co... 01/07/2014

Field	Operator	Value
Catalogue Item	=	The SAFE Files Privacy
Catalogue Item	=	The SAFE Files Equal Opportunity in Employm...
Catalogue Item	=	The SAFE Files Workplace Bullying

Search

Analysing the results

Looking at the report results, you'll see that each of our selected columns is displayed. All of the specific information we need is available, and anything we filtered out is not.

We can now see, for our chosen enrolment date range, who (**Full Name**) has not completed any of the three selected courses (**Catalogue Item**), and:

- The date they were enrolled in the course (**Enrolment Date**)
- When they are/were due to complete the course (**Due Date**)
- Whether or not they have attempted the course (**Enrolment Status**)
- The individual's manager (**Manager Name**)
- The business unit they belong to (**Business Unit**).

Full Name	Manager Name	Business Unit	Catalogue Item	Enrolment Date	Due date	Enrolment Status
Billy Jackson	Chloe Doring	Executive	The SAFE Files Workplace Bullying	3/07/2013 12:50 PM		Not Attempted
Brad Wiedmann	Jesse de Hek	Administrators	The SAFE Files Privacy	1/05/2014 10:45 AM		Not Attempted
Darren Andrews		Administrators	The SAFE Files Privacy	12/03/2014 10:41 AM		Not Attempted
Jane Anderson	Jake Robinson	Finance	The SAFE Files Workplace Bullying	26/11/2013 12:14 PM	3/12/2013 11:00 AM	Not Attempted
Jane Brown	Chloe Doring	Customer Service	The SAFE Files Workplace Bullying	15/07/2013 2:03 PM	14/08/2013 10:00 AM	Not Attempted
Jane Brown	Chloe Doring	Customer Service	The SAFE Files Workplace Bullying	15/07/2013 2:03 PM	14/08/2013 10:00 AM	Not Attempted
Jane Smitheton	Angela Collins	Finance	The SAFE Files Workplace Bullying	12/11/2013 10:48 AM	18/11/2013 11:00 AM	Not Attempted

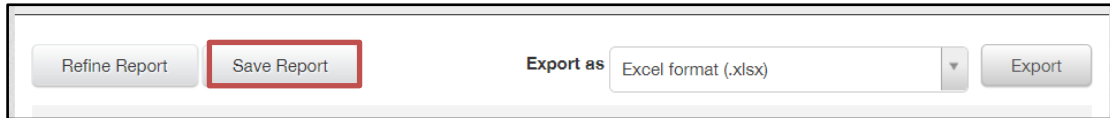
If necessary, make any amendments to your filters and run the report again. Once you get the results you're after, you can do one of three things:

1. Export the report
2. Save the report
3. Schedule the report.

Please note: The process for exporting and saving reports is covered in the Introduction to Reporting guide. The process for scheduling a report is included in the How to Export Reports (Via FTP & Email) guide.

Save the report

Let's save this report and name it 'Not Completed Enrolments'.

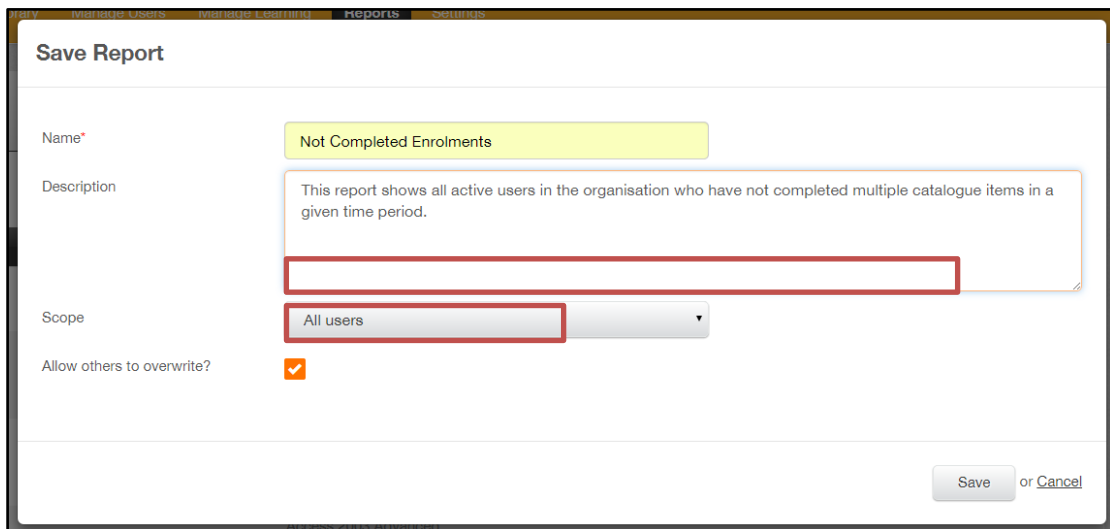


The screenshot shows a toolbar with three buttons: 'Refine Report', 'Save Report' (highlighted with a red box), and 'Export'. To the right of the 'Save Report' button is a dropdown menu labeled 'Export as' with 'Excel format (.xlsx)' selected, and an 'Export' button.

Enter the report details in the new page that pops up.

Selecting **All Users** from the **Scope** drop-down list makes your report available to everyone in your organisation that has Administrator rights. If you wish to restrict access to just yourself, select **Me** from this list.

Checking the **Allow others to overwrite** option means any user with Administrator privileges who has access to the saved report will be able to modify it without needing to save a copy.






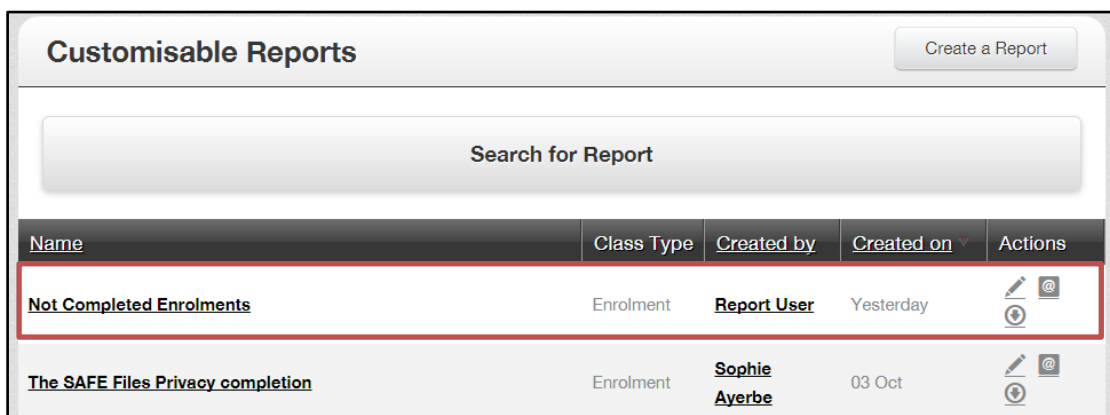
The 'Save Report' dialog box contains the following fields:

- Name***: A text input field containing 'Not Completed Enrolments'.
- Description**: A text area containing 'This report shows all active users in the organisation who have not completed multiple catalogue items in a given time period.' Below the text area is a red rectangular box.
- Scope**: A dropdown menu with 'All users' selected.
- Allow others to overwrite?**: A checkbox that is checked.







At the bottom right, there are 'Save' and 'or Cancel' buttons.

And now you're done! Return to the **Customisable Reports** page to see your saved report. From here you can:

- Run the report again (by selecting the report name)
- Edit the report (by selecting the pencil icon )
- Schedule the report by email or file/FTP (by selecting the email  or file  icons).



The 'Customisable Reports' page has a 'Create a Report' button at the top right and a 'Search for Report' input field. Below is a table of saved reports:

Name	Class Type	Created by	Created on	Actions
<u>Not Completed Enrolments</u>	Enrolment	Report User	Yesterday	  
<u>The SAFE Files Privacy completion</u>	Enrolment	Sophie Ayerbe	03 Oct	  

Appendices

Appendix 1

Control name	Definition																										
Field	This drop-down list contains all available options that you can choose to filter your report by, listed in related categories. For example, options related to the User Details category are Full Name, Email Address, Date Created, etc.																										
Operator	<p>This drop-down list contains a list of 'operations' or instructions for the data you want to filter. The available options* are:</p> <table> <tr> <th>Operator</th><th>Use when...</th></tr> <tr> <td>= (equals)</td><td>you want an exact match for the data you have entered/selected</td></tr> <tr> <td>!= (does not equal)</td><td>you do not want the exact data you have entered/selected to appear in your report results</td></tr> <tr> <td>< (is less than)</td><td>you want to see numbers that are less than (and not equal to) the number you have entered, e.g. 40 returns all numbers up to 39</td></tr> <tr> <td>> (is greater than)</td><td>you want to see numbers that are greater than (and not equal to) the number you have entered, e.g. 40 returns all numbers from 41 up</td></tr> <tr> <td>contains</td><td>you want to display results that include the text you have entered (e.g. 'and' returns 'anderson', 'sands', 'landers')</td></tr> <tr> <td>doesn't contain</td><td>you want to display results that do not include the text you have entered</td></tr> <tr> <td>start with</td><td>you want to display results where the filter starts with text you entered (e.g. 'and' returns 'anderson', 'andrews', 'andony')</td></tr> <tr> <td>end with</td><td>you want to display results where the filter ends with text you entered (e.g. 'and' returns 'grand', 'bland', 'sand')</td></tr> <tr> <td>before</td><td>you want to see dates that fall before (and not on) the specified date</td></tr> <tr> <td>after</td><td>you want to see dates that fall after (and not on) the specified date</td></tr> <tr> <td>is null</td><td>you want the field to be blank/empty</td></tr> <tr> <td>is not null</td><td>you want the field to contain any value</td></tr> </table> <p>*Options vary based on the selected Field</p>	Operator	Use when...	= (equals)	you want an exact match for the data you have entered/selected	!= (does not equal)	you do not want the exact data you have entered/selected to appear in your report results	< (is less than)	you want to see numbers that are less than (and not equal to) the number you have entered, e.g. 40 returns all numbers up to 39	> (is greater than)	you want to see numbers that are greater than (and not equal to) the number you have entered, e.g. 40 returns all numbers from 41 up	contains	you want to display results that include the text you have entered (e.g. 'and' returns 'anderson', 'sands', 'landers')	doesn't contain	you want to display results that do not include the text you have entered	start with	you want to display results where the filter starts with text you entered (e.g. 'and' returns 'anderson', 'andrews', 'andony')	end with	you want to display results where the filter ends with text you entered (e.g. 'and' returns 'grand', 'bland', 'sand')	before	you want to see dates that fall before (and not on) the specified date	after	you want to see dates that fall after (and not on) the specified date	is null	you want the field to be blank/empty	is not null	you want the field to contain any value
Operator	Use when...																										
= (equals)	you want an exact match for the data you have entered/selected																										
!= (does not equal)	you do not want the exact data you have entered/selected to appear in your report results																										
< (is less than)	you want to see numbers that are less than (and not equal to) the number you have entered, e.g. 40 returns all numbers up to 39																										
> (is greater than)	you want to see numbers that are greater than (and not equal to) the number you have entered, e.g. 40 returns all numbers from 41 up																										
contains	you want to display results that include the text you have entered (e.g. 'and' returns 'anderson', 'sands', 'landers')																										
doesn't contain	you want to display results that do not include the text you have entered																										
start with	you want to display results where the filter starts with text you entered (e.g. 'and' returns 'anderson', 'andrews', 'andony')																										
end with	you want to display results where the filter ends with text you entered (e.g. 'and' returns 'grand', 'bland', 'sand')																										
before	you want to see dates that fall before (and not on) the specified date																										
after	you want to see dates that fall after (and not on) the specified date																										
is null	you want the field to be blank/empty																										
is not null	you want the field to contain any value																										

Control name	Definition
Value	<p>This field will display one of three input types depending on the option that you have selected. The input types are free text field (type in required text), date picker (choose the date from a calendar) or drop-down list.</p> <p>For example, if your selected option is:</p> <ul style="list-style-type: none"> • Full Name – the Value field will become a free text field that allows you to type in all or part of a name • Completed Date – the Value field will split into two: the Const (specific date) or Param (period of time) drop-down list, and a date picker • Enrolment Status – the Value field will become a drop-down list of all enrolment statuses that could be applied to a User.
Control	<p>This check box allows you to choose whether this filter is able to be modified within the report page by anyone who runs the report. If you leave this check box deselected, anyone who wishes to modify the filter will need to select Refine Report and/or return to the New Report page to do so.</p>