

Custom Report Guide

This guide provides step-by-step instructions for creating and configuring custom reports in the AACN LearnCenter.

I. Creating a Custom Report

You must have Site Manager permissions to create a new custom report.

1. Log into the platform.
2. Access the **Admin menu** (gear icon in the top right corner).
3. Select **Reports** in the *E-learning* section.
4. Use the **Custom reports builder** tab.
5. Click the **plus icon** in the top right corner of the page to open the *Create a new custom report* panel.
6. In the *Type* step, select the type of report you wish to generate. Available User report types include:
 - **Users – Courses:** a concise overview of each users' progress in a course
 - Users – Course enrollment time
 - Groups/Branches – Courses
 - Courses – Users
 - **Users – Training material:** detailed overview of users' course activity
 - Users
7. Select **Next**.
8. In the *Details* step, insert a **Name** and **Description** for your report.
 - *Note:* The only allowed special character in the report name is the underscore (_).
9. Press **Create and edit**.

II. Configuring Report Tabs

After clicking *Create and edit*, a new page will open with five tabs for configuration: *Properties*, *Filters*, *View options*, *Schedule* and *Preview*.

A. Properties Tab

Configure core settings for your report.

- **Report Info:** Edit the report's name or description. The report type cannot be changed.
- **Time Zone for Date Fields:** Select the time zone for report data display and export. The default is your profile's time zone.
- **Visibility:** Configure who can view the report on the *Reports* page. The option **All Superadmins and the selected Power Users** makes the report visible to the creator, and a selected subset of site managers.
- **Report Download Permission from Link:** Select the **Login required to download the report** option.

B. Filters Tab

Refine the data included in your report using the following filter areas:

Filter Area	Applicable Reports	Filtering Action
User selection	Users - Courses, Users - Training Material, Courses - Users, Users - Learning Plans	Filter by specific users, groups (up to 50), or branches.
User options	Users - Courses, Users - Training Material, Courses - Users	Hide deactivated users, Hide expired users, and Show only users with learner as user course level.
Course selection	Users - Courses, Users - Training Material, Courses - Users, Groups/Branches - Courses	Filter by all courses, specific courses (up to 50). Type the name of the course.

Filter Area	Applicable Reports	Filtering Action
Course type	Users - Courses, Users - Training Material, Courses - Users	Choose All course types .
Completion date	Users - Courses, Users - Training Material, Courses - Users	Retrieve information based on course completion dates using absolute or relative date ranges.
Enrollment date	Users - Courses, Users - Training Material, Courses - Users	Retrieve information based on course enrollment dates using absolute or relative date ranges.
Training material types	Users - Training Material	Select one or more training material types.

C. View Options Tab

Select the fields to display and the order of data.

- **Report fields:** Select the fields you want to display. Default fields are grayed out and cannot be deselected (e.g., *Username* and *Course title* in a Users-Courses report).
 - **Users-Courses Report Example View Options:** first and last name, completion and first access date, and course progress %.
 - **Users-Training Materials Report Example View Options:** first and last name, training material status and score, and completion date.
- **Sorting options:** Set the order of data using the *Order by* area. You can choose a custom field from the *Report fields* section for sorting and apply ascending or descending order.

D. Schedule Tab

Configure recurring report generation and email delivery.

1. Activate the **Enable scheduling for this report** toggle.
2. Choose the frequency (daily, weekly, or monthly).
3. Set the start date and time, and the time zone.
4. Add recipient email addresses, pressing "Enter" after each one.

Note: Reports are sent as a download link.

E. Preview Tab

View a sample of the data that will be included in your final report, reflecting applied settings.

III. Exporting and Running the Report

You can export your report in CSV or Excel.

- **Exporting:**
 - From the report page, press the **Export icon** and choose the file type.
 - From the *Custom reports builder* tab, click the **ellipsis icon** next to the report row and select **Export** (CSV or XLS).
- **Running:** You can run the report from the main **Custom reports builder** tab by clicking the **ellipsis icon** next to the report row and selecting the corresponding option.