Configuring a Report
This section describes the Report Configuration screen and explains how to configure a report using data specific Fields and Filters. To access this screen, click the Create New Report link beneath the dataset you wish to use for your report.

Selecting Report Data Fields
The Fields selection box is a scrollable list of all the data fields available within the dataset you selected. Click the checkbox next to any data field to include it as a column in your report. See Appendix A for a complete list of fields and their definitions.

Example: You need to create an email list of all your users so you want your report to include a column for each user’s name and a column for each user’s email. To do so, click the checkbox next to the Name and Email fields, and then click Run Report.

To select all of the fields, click the All option beneath the Fields selection box. To clear all of the fields, click the None option.
Setting up Filters
Using filters will allow you to refine what data is included in your report. A filter consists of the following four parts: input field, logical operator, comparison operator, and criterion/criteria.

When setting up a filter, the first thing you need to do is select an input field to use for your filter.

Input Field: is a drop down menu of all the data fields available in the dataset you selected. You can select any field in the dataset, even those that have not been selected for display in the report.

Select an input field and click the Add Filter button to add that as a filter to your configuration. To remove any filter from the list, click the Remove Filter button.
Next, select a comparison operator.

**Comparison Operator:** can be selected from the drop-down menu. To search on null values (empty fields), select “is empty” from the drop-down menu.

The drop-down menu options for the comparison operator will vary depending on whether the input field selected is text, predefined text, a date, or a number. Below are examples of each.

**When the input field is text:**

**When the input field is predefined text:**

A predefined text field is one that has a limited number of set values. When equals is selected as the comparison operator, a drop-down menu will then appear in the criterion field. In this example, Course Status can only equal the following: completed, enrolled, expired, future, or overdue.
When the input field is a **date**:

![Image of a date due filter with options](image)

**Note:** When the comparison operator is either **is greater than** or **is less than**, a calendar icon appears to the right of the criteria field. Click on it and select the appropriate date from the popup calendar.

![Image of a calendar with selected date](image)

When the Input field is a **number**:

![Image of a credits filter with options](image)
Next, specify the criterion/criteria.

Criterion/Criteria: is/are the specific value(s) that will be used in the filter operation.

To add additional criteria to a filter, click the Add Criterion button located to the right of the match any option. To remove criteria, click on the Remove Criterion button.

Finally, select the logical operator.

Logical Operator: allows you to change the way the filter works when you have multiple criteria.

When “match any” is selected, a record will be displayed if it matches any of the operators and criteria specified. When “match all” is selected, a record will be displayed only if it matches all of the operators and criteria specified. To illustrate this functionality, refer to the example below.

Example: Create a filter to show users whose company name contains “ICS” AND “Learning”

1. Select Company as the input field and click the Add Filter button.
2. Select “match all.”
3. Select “contains” from the drop-down menu.
4. Type “ICS” into the criterion field.
5. To expand a filter that has already been created, click the Add Criterion button located to the right of the match any option.
6. Select “contains” from the drop-down menu.
7. Type “Learning” into the criterion field.

When you have multiple filters, it is important to note that the overall Logical Operator between those filters is “AND.” Please refer to the example below.
Example: Create filters to show users in the group named “Support/IT Staff” AND users whose company name contains “ICS” OR “IBM”:

1. Follow steps 1-7 above, but select “match any” as the logical operator.
2. Select Group as the input field and click the Add Filter button.
3. Select “match any.”
4. Select equals from the drop-down menu.
5. Select Support/IT Staff as the criterion.

In the example above, the report will only show records that meet ALL the criteria: The user is in the group named “Support/IT Staff” AND the user’s company name contains “ICS” OR “Learning.”