

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.

Report: Add Report (Course Transcripts)

CONFIGURATION SAVE SETTINGS

Details
Use the interface below to select the columns and filters to apply to this report.

FIELDS
Select the fields from this dataset that you would like to appear in your report:

- Name
- Email
- Username
- Job Title
- Job Class
- Company

Select: All | None

Run Report

FILTERS
Specify the report filters below. Only data that matches the criteria you specify below will be included in your report.

+ Name

Indicates which dataset you are using.

Fields: a scrollable list of all data fields (specific to the each dataset) available for display in this report.

Filters: allows you to refine what data is included in 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.

FIELDS
Select the fields from this dataset that you would like to appear in your report:

- Name
- Email
- Username
- Job Title
- Job Class
- Company

Select: All | None

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.

The screenshot shows the 'FILTERS' configuration window. At the top, it says 'Specify the report filters below. Only data that matches the criteria you specify below will be included in your report.' Below this, there is a filter configuration area. A green plus sign is next to a dropdown menu showing 'Name'. To the right, there is a red 'X' icon next to the text 'Country'. Next to this is a logical operator section with two radio buttons: 'match any' (which is selected) and 'match all'. To the right of this is a comparison operator section with a green plus sign and a grey 'X' icon, and a dropdown menu showing 'equals'. Finally, there is a text input field containing 'US'. Below the filter configuration area, there are four callout boxes with arrows pointing to the corresponding parts: 'Input Field' points to the 'Name' dropdown, 'Logical Operator' points to the 'match any' radio button, 'Comparison Operator' points to the 'equals' dropdown, and 'Criterion/Criteria' points to the 'US' text field.

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

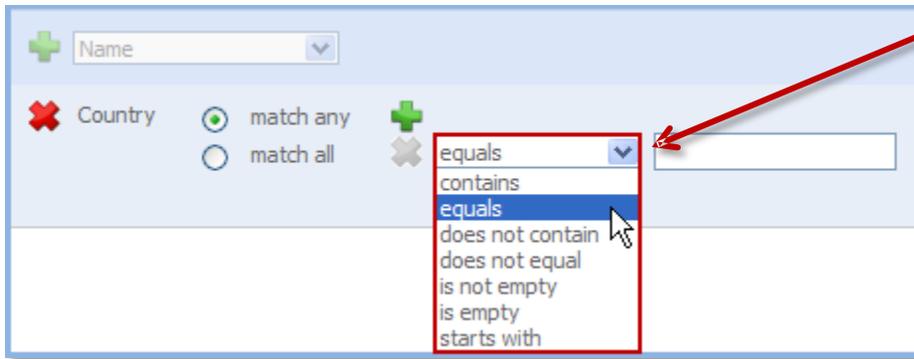
The screenshot shows the 'FILTERS' configuration window. At the top, it says 'Specify the report filters below. Only data that matches the criteria you specify below will be included in your report.' Below this, there is a list of input fields. A green plus sign is next to a dropdown menu showing 'Name'. The dropdown menu is open, showing a list of fields: Name, Email, Username, Job Title, Job Class, Company, Street Address, City, State/Province, Postal Code, Country (which is highlighted), Primary Phone, Work Phone, Home Phone, Fax, Mobile Phone, Pager, Other Phone, Division, Department, Supervisor, Region, Employee ID, Social Security Number, Gender, Race, Date of Birth, Status, Created, and Expires. A red arrow points from the 'Country' field in the list to the 'Country' field in the filter configuration area.

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



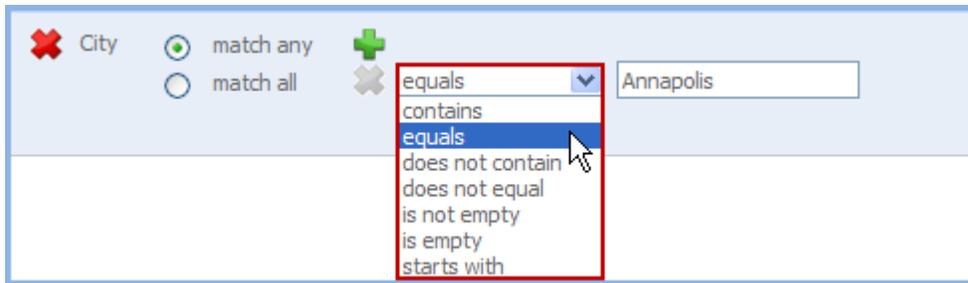
Next, select a comparison operator.



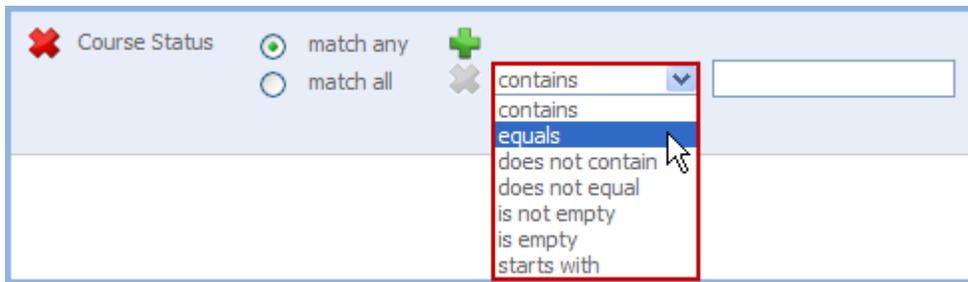
Comparison Operator: can be selected from the drop-down menu. To search on null values (empty fields), select “is empty” from the drop-down menu.

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.

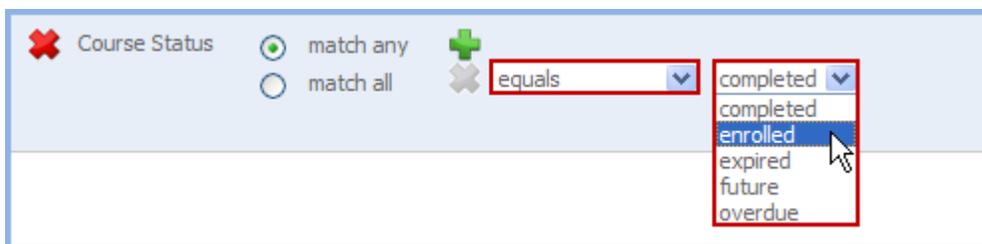
When the input field is **text**:



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**:

The screenshot shows a criteria field for 'Date Due'. The dropdown menu is open, showing various comparison operators. The 'is greater than' option is selected and highlighted in blue. A calendar icon is visible to the right of the input field.

Criteria: Date Due match any match all + -

Dropdown menu options:

- is greater than (selected)
- is greater than
- is less than
- is not empty
- is empty
- today
- yesterday
- last 7 days
- this week
- last week
- last 2 weeks
- this month
- last month
- last 3 months
- last 6 months
- this quarter
- last quarter
- last 2 quarters
- last 3 quarters
- last 4 quarters
- this year
- last year

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.

The screenshot shows a calendar for October 2012. The date '5' is selected. Below the calendar, the criteria field shows 'is greater than' and the date '2012-10-05' is entered in the input field.

Calendar: OCTOBER 2012

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Criteria: Date Due match any match all + - is greater than

Input field: 2012-10-05

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

The screenshot shows a criteria field for 'Credits'. The dropdown menu is open, showing various comparison operators. The 'is less than' option is selected and highlighted in blue.

Criteria: Credits match any match all + -

Dropdown menu options:

- is less than (selected)
- equals
- is greater than
- is less than
- is not empty
- is empty

Input field: 3

Next, specify the criterion/criteria.

A screenshot of a filter configuration interface. On the left, there is a red 'X' icon next to the text 'Country'. To its right are two radio buttons: 'match any' (which is selected) and 'match all'. Further right is a green plus sign icon, followed by a grey 'X' icon, a dropdown menu showing 'equals', and a text input field containing 'US'. A red box highlights the 'equals' dropdown and the 'US' text field. A red arrow points from the text 'Criterion/Criteria:' to the 'US' field.

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.

A screenshot of a filter configuration interface. On the left, there is a red 'X' icon next to the text 'Country'. To its right are two radio buttons: 'match any' (which is selected) and 'match all'. A red box highlights these two radio buttons. A red arrow points from the text 'Logical Operator:' to the 'match any' radio button. To the right of the radio buttons is a green plus sign icon, followed by a grey 'X' icon, a dropdown menu showing 'equals', and a text input field containing 'US'.

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.

A screenshot of a filter configuration interface. On the left, there is a red 'X' icon next to the text 'Company'. To its right are two radio buttons: 'match any' and 'match all' (which is selected). A red box highlights these two radio buttons. To the right of the radio buttons is a green plus sign icon, followed by a grey 'X' icon, a dropdown menu showing 'contains', and a text input field containing 'ICS'. Below this is another row with a red 'X' icon, a grey 'X' icon, a dropdown menu showing 'contains', and a text input field containing 'Learning'. A red box highlights the entire second row.

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.



 Group	<input checked="" type="radio"/> match any		equals	Support/IT Staff
 Company	<input checked="" type="radio"/> match any		contains	ICS
	<input type="radio"/> match all		contains	IBM

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.”