Custom Reports

iLearn

For: Content Administrators and Event Facilitators

Contact Details: For any queries or reporting access please contact iLearn Support: support@ilearnsupport.zendesk.com

Queensland Government

Version History

Version 1.0
Publication Date: 1 June 2016

Version Number	Revision Details	Revised by	Applicable to Departments:
1.0	Customisable Reports	Learning Management, Workforce Capability, DCCSDS	DCCSDS, DATSIP, DPC, EHP, NPSR

Developed by Workforce Capability, Human Resources and Ethical Standards, Department of Communities, Disability Services and Child Safety.

Disclaimer:

The written materials provided are distributed by the State of Queensland acting through the Department of Communities, Child Safety and Disability Services as an information source only. Although every effort has been made to ensure the accuracy, currency and reliability of information, regular updates to the iLearn system could have an impact on the currency and accuracy of the written material.

Contents

Introduction

Brief overview

Customisable reports provide the ability to create and run detailed reports on:

- Users' course completion - who has/has not completed your training (Catalogue Item).
- Users progress status - what is the learner's progress on the different components in the program i.e. Incomplete, Not Attempted, Complete, etc.
- Learning Event session attendance – who is attending your session and what is their attendance status (i.e. Pending Approval, Attending, Withdrawn etc.).
- Waitlisted users - who are on the waitlist for your learning event, waitlist type, date added to the waitlist, etc.
- Information on Catalogue Items – Catalogue Item Status (i.e. Archived, Available in Catalogue, Draft, Not in Catalogue), Approx. Duration, overview, tags, etc.
- Survey Results – answers to yours survey questions.

Please note the above list is not exhaustive and there are a number of reports you can create and run in iLearn, depending on the information you require.

There are two ways to create a new report:

- you can create a report from scratch and save it (Create a custom report) or
- you can refine an existing report, provided you have the permissions (by changing the filters and modifying the details) and save it as a copy (Manage a custom report).

Before creating a report from scratch, first search for an existing report and determine if you can refine or modify it to suit your needs. When you use an existing report and modify it, you do not have to save it if it was only a one time occurrence.

There are also two ways to run a report:

- You can either create a new report (Create a custom report) and run it, or
- locate a previously saved report (Manage a custom report) and run it.

When you run a report the results are shown on the screen and the results can be exported to Excel and further refined by applying filters. The report itself can be named and saved so that it can be run as required. Reports can also be scheduled to run automatically.

Steps to create and run a report:

- Select the **report type** you wish to create e.g. Enrolment
- Apply **filter**(s) to precisely define part of that report type e.g. all Catalogue Items for the region
- Select the report **information** to be included in the report e.g. User's names and Enrolment Status. Optionally **order** the way this is displayed
- **Run** the report and **view** the results
- Optionally export and **save** the **results** in an Excel file
- Optionally **name** the report and **save** it for use in the future

Reporting access

Not all users are authorised to use the Customisable Reports tool. Depending on your role and if reports have been permissioned to you, will determine if you can run and/or create reports.

The table below outlines the 3 roles in iLearn, their description and reporting access:

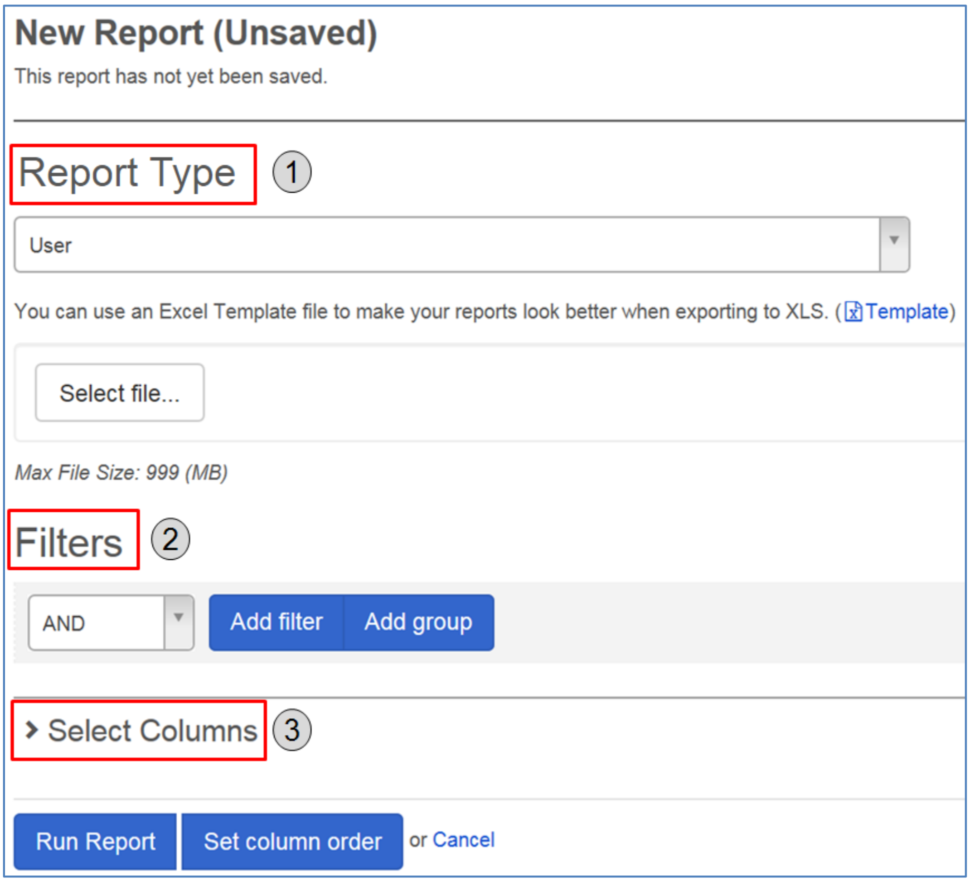
Role	Role description	Reporting access
Content Administrator (CA)	Access to: • Create learning i.e.: ⇨ Create Catalogue Items and Learning Assets under the **'Manage Catalogue'** menu. • Manage Learning i.e.: ⇨ Create sessions and edit sessions, mark attendance and manage waitlists under the **'Manage Sessions'** menu. ⇨ Enrol learners through the **'Assign Learning'** menu ⇨ View and cancel enrolments under the **'Enrolments'** menu. ⇨ Approve learning under the **'Approve Learning'** menu.	• Access to create and refine reports (i.e. change filters) under the '**Customisable Reports'** menu.
Event Facilitators (EF)	Access to: • Manage Learning i.e.: ⇨ Create sessions and edit sessions, mark attendance and manage waitlists under the **'Manage Sessions'** menu. ⇨ Enrol learners through the **'Assign Learning'** menu ⇨ View and cancel enrolments under the **'Enrolments'** menu. ⇨ Approve learning under the **'Approve**	• Do not have access to create reports. • Access to run reports that have been permissioned to them, under the **'Customisable Reports'** menu. • Permission to modify the filter details but cannot refine the filters (i.e. change reports).

	Learning' menu.	
Basic Users	• Do not have access to Create or Manage Learning. • Can search for and enrol into Catalogue Items under **Browse Learning** menu.	• Access to run reports that have been permissioned to them under the **'Customisable Reports'** menu. • Permission to modify the filter details but cannot refine the filters (i.e. change reports).

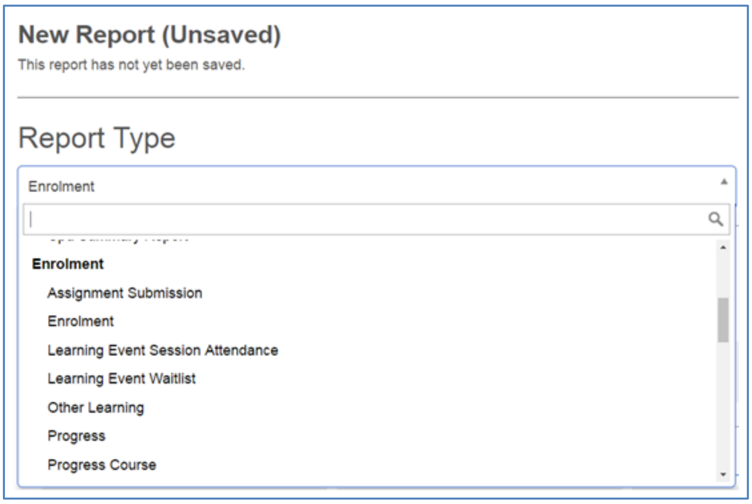
Reporting building blocks

Before you create and run a report we need to define the 3 main building blocks of reports:

1. **Report Type**
2. **Filters** (the fields available will change depending on which report type you select)
3. **Report Information**/details (displayed under the 'Select Columns' section and mirrors the filter fields)



1. Report type



Report Type in iLearn refers to the different components in iLearn you can report on (it is like a report template). There are a number of report types to choose from, but the most common report types you will require are:

- Enrolment
- Learning Event Session Attendance
- Learning Event Waitlist
- Progress

*The above report types are grouped under the heading **'Enrolment'** in the Report Type selection box*

- Answer

*The above report type is grouped under the heading **'Test'** in the Report Type selection box*

- Catalogue Item
- Learning Event Session

*The above report types are grouped under the heading '**Other'** in the Report Type selection box*

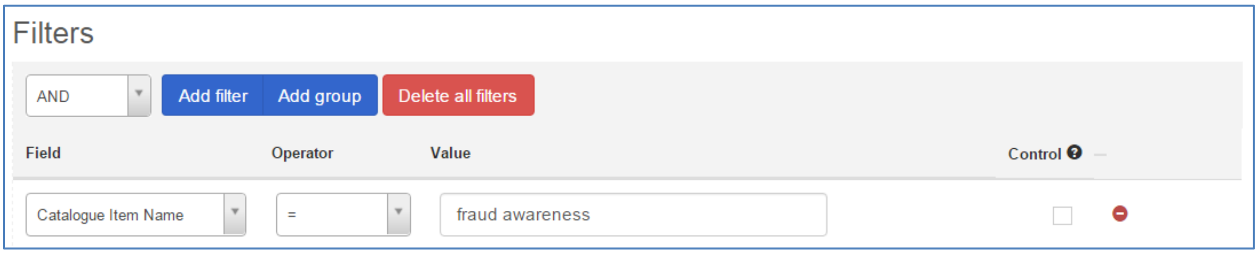
2. Filters

Filter(s) are applied to precisely define part/s of the report type. They are like logic rules which you apply to only select certain parts of the report type. It basically narrows and targets your search.

For example, to view completed enrolments for Fraud Awareness training; you would choose the report type **Enrolment** and select a filter to define (or narrow down) your search to only return information on **Fraud Awareness.** If you do not use a filter the report will extract and return the enrolments for all Catalogue Items (training) in iLearn.

Each report type has a set of filters attached to it. You can select a filter from a drop-down list. When you have selected a report type, the details attached to that report type are displayed in the lower part of the screen in columns. These details mirror the filters that are available to you. By browsing the 'Select Columns' section below the Filters, you will get an idea of what is available to you as filters. See Report type information below.

In the below screen capture we have used the filter to target our search to only include courses named 'fraud awareness'.



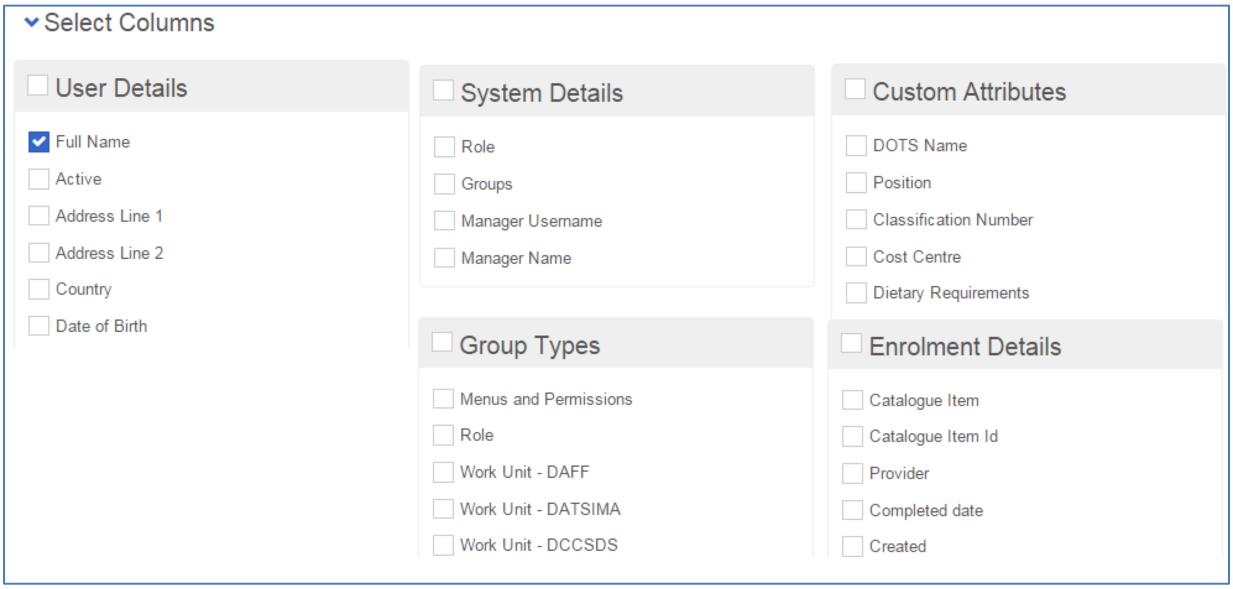
Note that an alternative to using complex filters (i.e. adding a couple of filters and even filter groups) is to use one or two filters to define your search and then export the results of your report to an Excel file. In Excel you can then apply filters to further refine your data.

Also note that if the report filters are broad you can use the same report for many different reporting requirements such as the Learning Event Session Attendance (All sessions) and Enrolment Status (All courses). You export the information to Excel and filter on the Catalogue Items or Learning Events you are looking for.

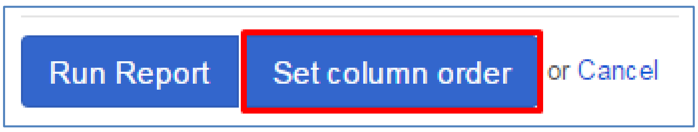
3. Report type information

Each report type has a set of specific details attached to it. The details are listed in column sets and you can select what details you want included in your report. As noted above, all the report type details are available to you as filters.

The below screen capture reflects some of the details attached to the 'Enrolment' report type:



You also have the option to order the way the details are displayed in the report by choosing **'Set column order'**.



Selecting a report type

To understand reporting you need to understand the report type (report template).

The table below will assist you in determining what report type you need to use for the information you require. It gives a description about the report type and when best to use it. There are a number of report types available to you but the ones listed below are the most popular.

Report type	Report type description
Enrolment	This report is best to run to see overall status of enrolments for catalogue items or programs. Run this report to see the names of learners that have completed a particular catalogue item/program. The enrolment report will look at historical data imported from the previous Learning Management Systems (Learning Station). **This report looks at all training types such as Learning Events (e.g. face-to face training, workshops, webinars etc.), and Online Courses,** whereas the Learning Event Session Attendance report only looks at sessions for a Learning Event (e.g. face-to-face training, workshops, webinars).
Learning Event Session Attendance	Use this report type to create a report to see who is on specific sessions. This report shows Users enrolled and their **attendance status (i.e. Attending, Pending Approval, Withdrawn, Attended, Did not attend, Waitlisted)** by session, date, venue, location as well as their **enrolment status (Not Attempted, Pending, Completed, Cancelled, Declined)**. This report is only for Learning Events (e.g. face to face training sessions entered in iLearn from 1 December 2014 onwards); it does not include online training. For online training it is best to use the 'Enrolment' report.
Learning Event Session	This report is by Session not people. It lists **Session details** and **Session Status** i.e. published, completed, cancelled, archived, setup. It gives a summary of numbers enrolled, waitlisted by Learning Event Name and lists the Venue and Facilitator. This report can assist with what is upcoming scheduled training and an audit of past sessions with unmarked attendances.
Learning Event Waitlist	This report shows the breakdown of waitlisted people by **session waitlist** and **event waitlist** and the date they were added to the event waitlist. This is a good report to review the waitlist to clean up enrolments after a program has been completed or see who hasn't clicked the 'Attend Session' button for a Learning Event that is within a Program.
Progress	This report is best used for Programs. It shows the enrolment status for the overall Program and there is a line per Learning Asset/Component that will show the User's enrolment status per component. There will be multiple lines per User. If you want the overall enrolment status per program then it is best to use the 'Enrolment' report (one line per User).
TEST Answer	This is best used for reports on Survey answers.
Catalogue Item	This report is great for auditing all your existing Catalogue Items in iLearn. It shows the Catalogue item/Program name, its status i.e. **'Available in Catalogue', 'Not in Catalogue', 'Archived'** or **'Draft'**. The report shows the Catalogue overview text and the Catalogue item tags.

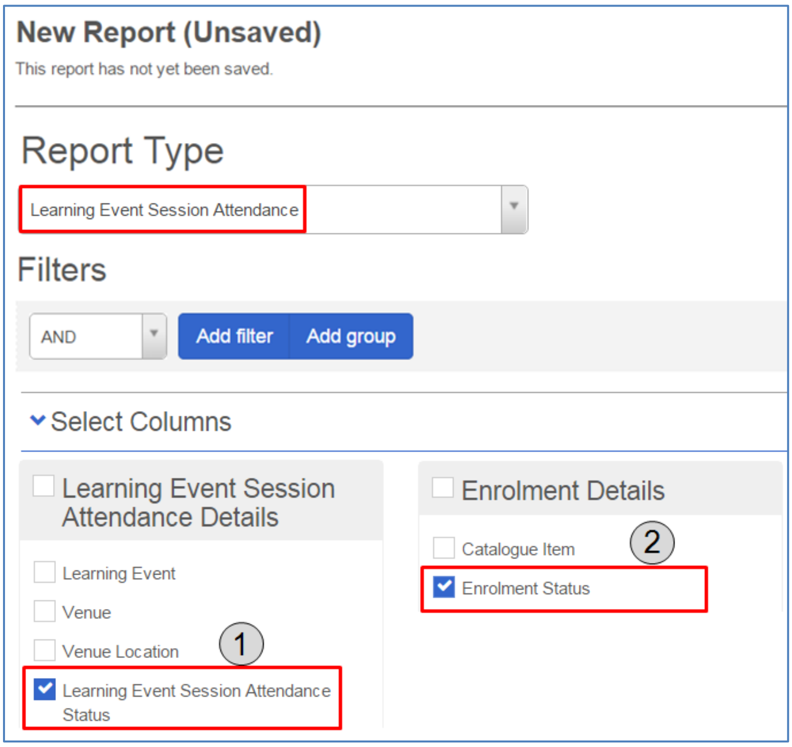
Enrolment status vs Learning Event Session Attendance status

Learning Event Session Attendance report

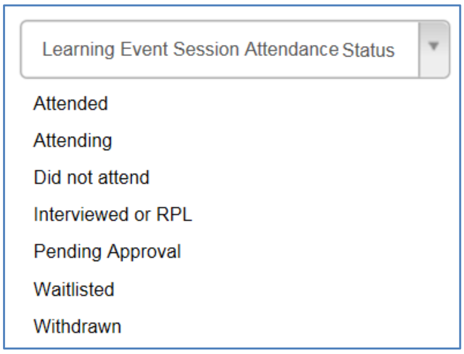
When creating a *Learning Event Session Attendance* report, you will have two fields relating to the status listed under the column set to include in your report i.e.

- **Learning Event Session Attendance Status** (1) under the column heading *Learning Event Session Attendance Details* and the
- **Enrolment Status** (2) under the column heading *Enrolment Details*.

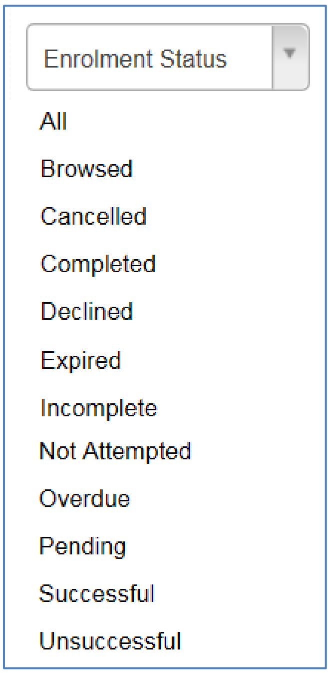
To simplify the screen capture, the majority of the unselected fields have been removed from the below image:



The Learning Event Attendance Status show the following status related to the **session:**



The Enrolment Status show the enrolment status for the **Catalogue Item** as follows:



The Session Attendance Status vs Enrolment Status table

Learning Event Level		Catalogue Level	Learning Event Level
Learning Event Session Attendance Status		**Enrolment Status**	**Learning Event Status Description**
Pending Approval	=	Pending	Enrolment is pending manager approval.
-		Declined	Pending enrolment is declined by the User's manager or course administrator.
Attending	=	Not Attempted	User is Enrolled and Attending on session.
Waitlisted	=	Not Attempted	User is Enrolled and Waitlisted.
Did Not Attend	=	Not Attempted	User is Enrolled and marked off as 'Did not attend' on session. User is automatically moved to Event Waiting List for future sessions.
Withdrawn	=	Cancelled	User's session status was shown as "attending" and either withdraws from the session, or the CA, EF cancelled Users enrolment.
Attended	=	Completed	User's attendance marked off on the session as 'Attended'.

Note: There can be variances to the status shown in above table dependant on the Learning Event Settings.

Enrolment report

When creating an *Enrolment* report you will only have one field relating to the status listed under the column heading Enrolment Details to include in your report i.e.

- **Enrolment Status** (i.e. All, Browsed, Cancelled, Completed, Incomplete, Pending, Declined, Not Attempted, etc.) that show the enrolment status for the **Catalogue Item**.

Catalogue level	
Enrolment Status	**Enrolment Status Description**
Pending	Enrolment is pending manager approval.
Declined	Pending enrolment is declined by the User's manager or course administrator.
Not Attempted	User is Enrolled but has not commenced training.
Not Attempted	User is Enrolled and Waitlisted for a Learning Event Session.
Not Attempted	User is Enrolled and marked off as 'Did not attend' on session. User is automatically moved to Event Waiting List for future sessions.
Cancelled	Enrolment was either cancelled by the User or cancelled by the CA, EF
Completed	User has completed the training
Incomplete	User has started the training but has not completed it.
Unsuccessful	Unsuccessful enrolment migrated to iLearn from previous LMS Learning Station.

Progress report

When creating a *Progress* report you will have a field relating to the status listed under the column Progress Details to include in your report i.e.:

- **Progress Status** that shows the enrolment status for the **program as a whole** (i.e. for the Catalogue Item - Program) as well as the status relating to **each of the components / learning assets** (e.g. Learning Event, Online Course or Assessment etc.) contained in the program.

The Progress Status show the following status related to the Learning Assets:

Progress Status

All
Browsed
Cancelled
Completed
Declined
Expired
Incomplete
Not Attempted
Overdue
Pending
Successful
Unsuccessful

When creating a Progress report, be sure to always include the field '**Learning Asset Type'** listed under the Progress Details column to assist you in distinguishing between the Catalogue Item and the different Asset Types (i.e. Learning Event, Course, Test, Trackable Document etc.).

Example –

Progress report results exported to Excel:

The Manager Team Leader CST Coaching Program has 9 lines in the report for each User. 1 Line is the Catalogue item and 8 lines for the learning events (i.e. there are 8 components/learning assets making up the program).

Learning Asset Name	Learning Asset Type	Progress Status	Completed	Completed date
[DC-PLU] Manager Team Leader CST Coaching NQ Group 1 F2F 2	Learning Event	Completed	True	25/11/2015 12:30 PM
[DC-PLU] Manager Team Leader CST Coaching NQ Group 1 Webinar 1	Learning Event	Not Attempted	False	
[DC-PLU] Manager Team Leader CST Coaching NQ Group 1 Webinar 2	Learning Event	Not Attempted	False	
[DC-PLU] Manager Team Leader CST Coaching NQ Group 1 Webinar 3	Learning Event	Not Attempted	False	
[DC-PLU] Manager Team Leader CST Coaching NQ Group 1 Webinar 4	Learning Event	Not Attempted	False	
[DC-PLU] Manager Team Leader CST Coaching NQ Group 1 F2F 3	Learning Event	Not Attempted	False	
[DC-PLU] Manager Team Leader CST Coaching NQ Group 1 Webinar 5	Learning Event	Not Attempted	False	
[DC-PLU] Manager Team Leader CST Coaching NQ Group 1 Webinar 6	Learning Event	Not Attempted	False	
[DC-PLU] Manager Team Leader CST Coaching NQ Group 1	Catalogue Item	Incomplete	False	

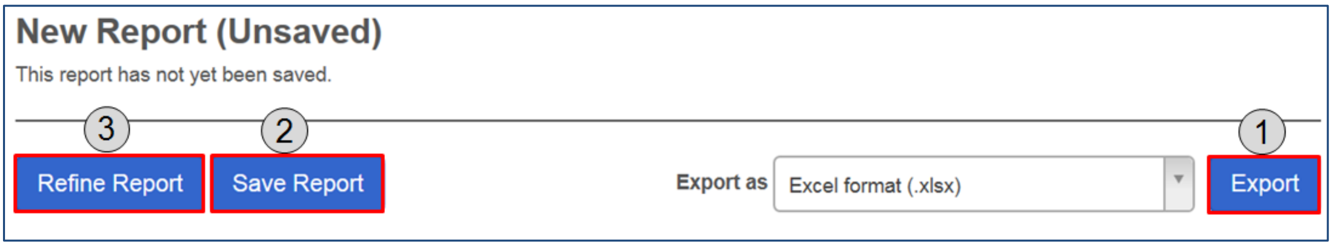
Create a custom report

Only Content Administrators have access to create a customisable report. There are two ways to create a new report:

- You can create one from scratch (see below To create a custom report), or
- You can locate and run an existing report and then refine (edit) it, see Manage a custom report.

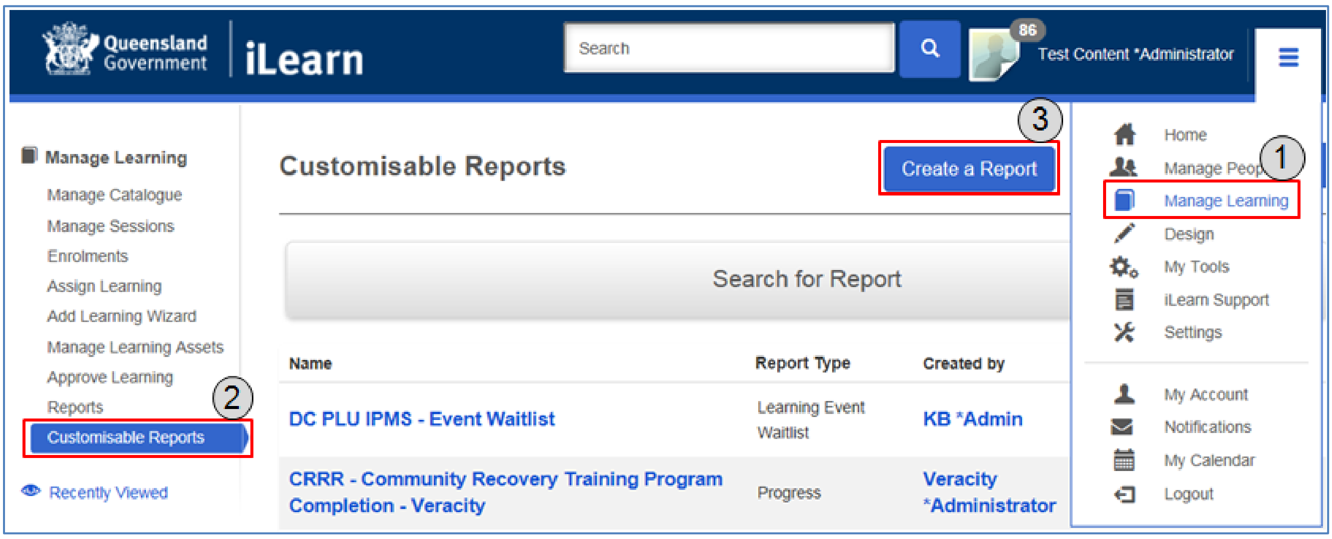
Click on a report to run it and the results will be displayed. The results screen will offer you the options to:

1. Export these results to Excel,
2. Save the report itself, or
3. Refine (edit) the report instructions (i.e. modify the details selected or change the filters).

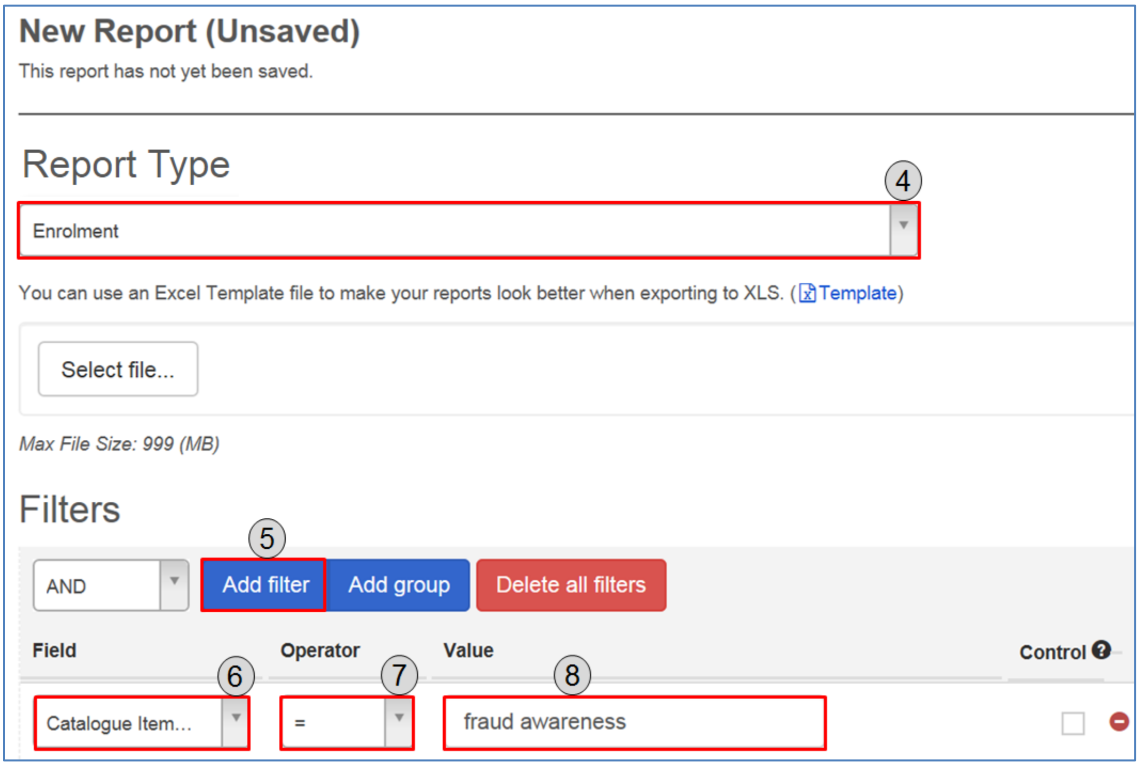


To create a custom report:

1. From the main menu select **Manage Learning**
2. Click **Customisable Reports**
3. Click **Create a Report**



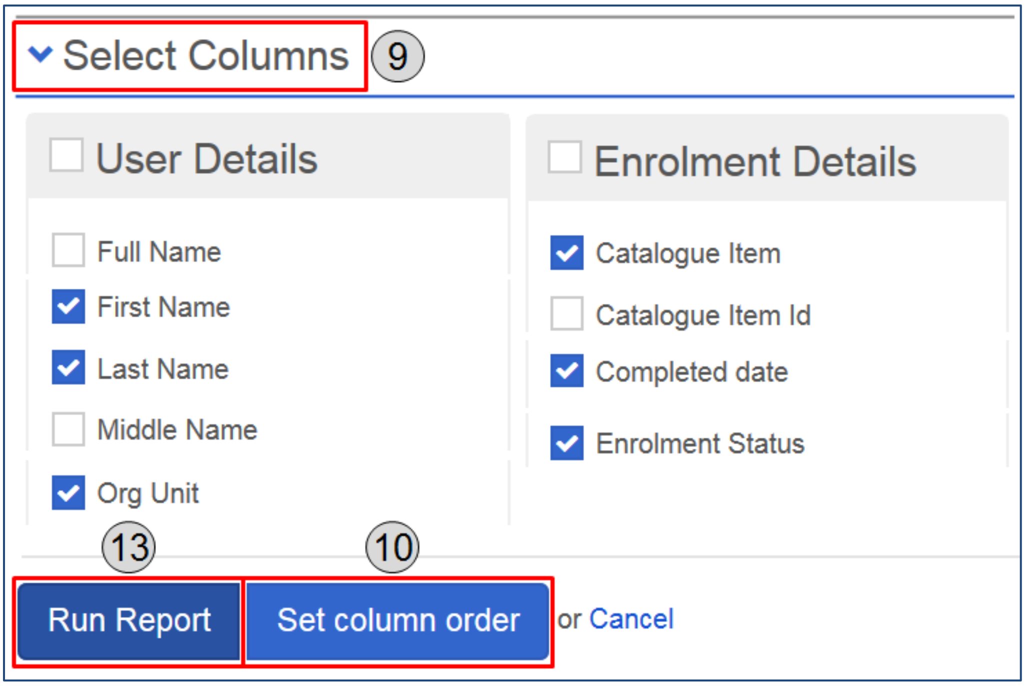
4. Click the drop-down arrow under **Report Type** and select the required report type from the drop-down list. For more information on what report type to use see Selecting a report type.
You can only select one report type per report. In this example *'Enrolment'* has been selected.
5. Click **Add filter** under Filters to define (narrow down) parts of the report type. See instructions in Building filters. In this example, a simple filter selects enrolments where the Catalogue Item Name is Fraud Awareness. Note that if the report filters are broad you can use the same report for many different reporting requirements, by exporting it to Excel and then applying filters to narrow down your search results.
6. Click drop-down arrow under **Field** to select a field. In this example *'Catalogue Item Name'* has been selected.
7. Click drop-down arrow under **Operator** to select the operator. In this example the default operator value *'='* has been selected.
8. Enter your value in the **Value** field. In this example the Catalogue Item Name *'fraud awareness'* has been entered. Note that when you select '=' as the operator, the spelling of the Catalogue Item Name has to be identical to how it has been entered into iLearn. If there are square brackets in front of the name, be sure to include it (e.g. ***[DC-HRES]*** *Fraud Awareness*) – the field is not case sensitive.

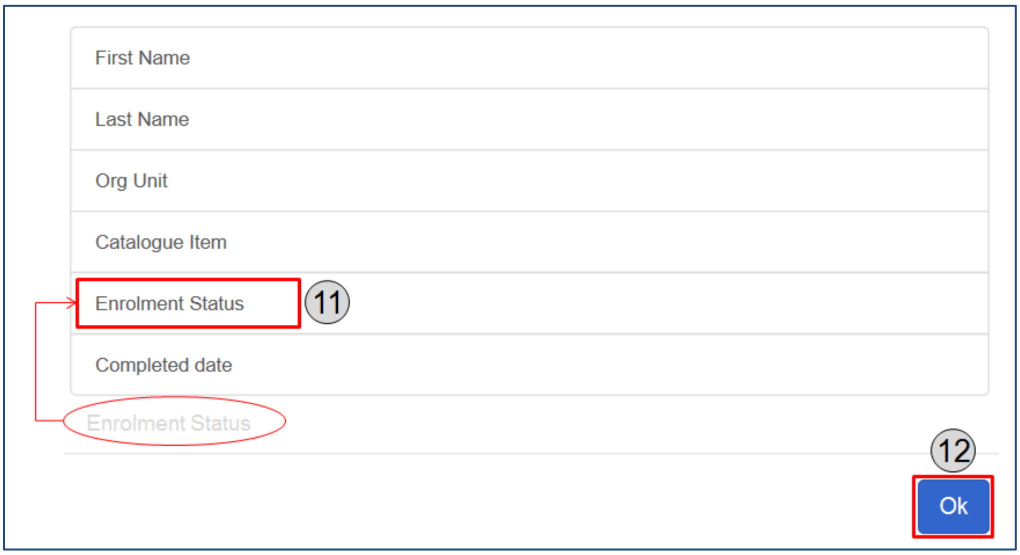


9. In **Select Columns** check the details (fields) of the report type that you want included in your report. The fields that you can select are different for each report type. Note that these options also give you a useful sense of the information that is stored in iLearn for a report type. In this example

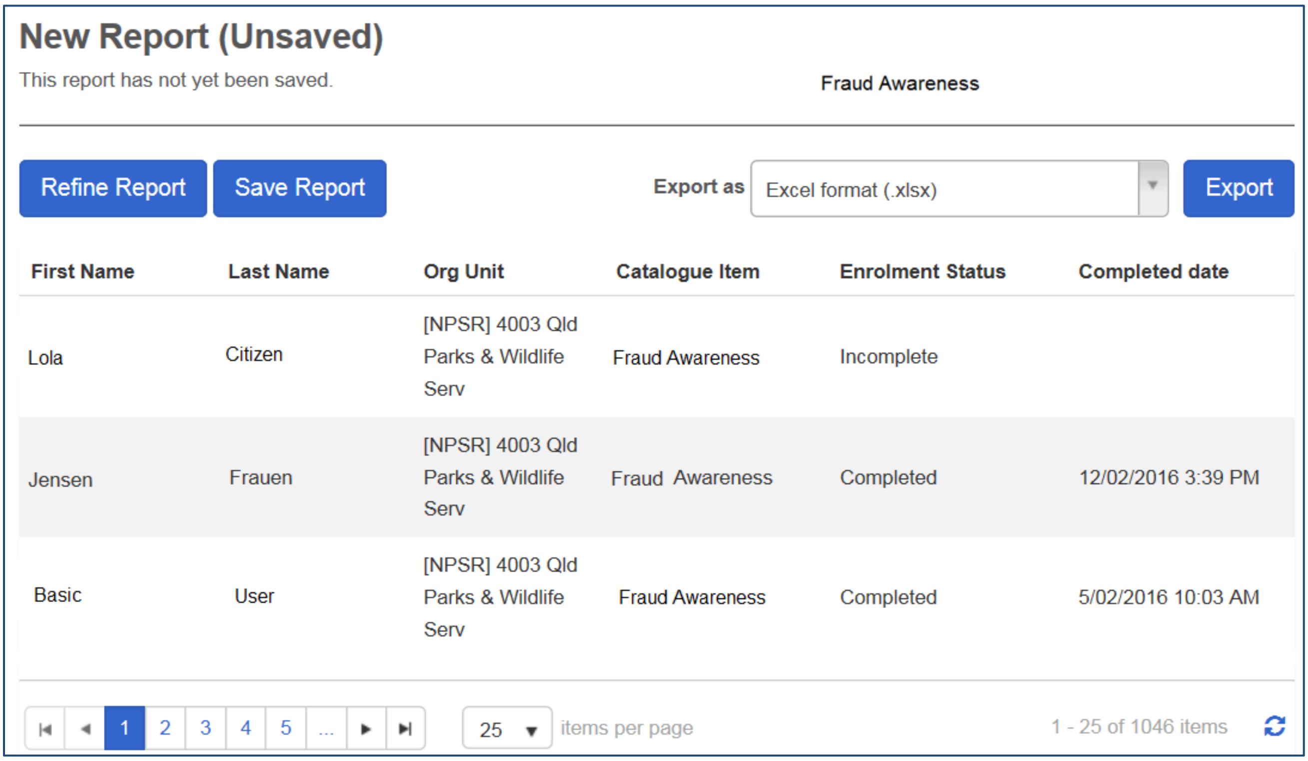
six fields have been selected. To simplify the screen capture, the majority of the unselected fields have been removed from the image.

10. Click **Set column order** if you want to customise the display order of the columns of information.
11. Change the order by dragging rows (e.g. *Enrolment Status* in the example below) up or down in the list and
12. click **OK.**
13. Click **Run Report** to display the results of the report.





The results of your report are displayed on the screen:



First Name	Last Name	Org Unit	Catalogue Item	Enrolment Status	Completed date
Lola	Citizen	[NPSR] 4003 Qld Parks & Wildlife Serv	Fraud Awareness	Incomplete	
Jensen	Frauen	[NPSR] 4003 Qld Parks & Wildlife Serv	Fraud Awareness	Completed	12/02/2016 3:39 PM
Basic	User	[NPSR] 4003 Qld Parks & Wildlife Serv	Fraud Awareness	Completed	5/02/2016 10:03 AM

The results screen also has options at the top of the screen to Export these results, Save the report itself or Refine (edit) the report.

Save the report

Only Content Administrators can save a report.

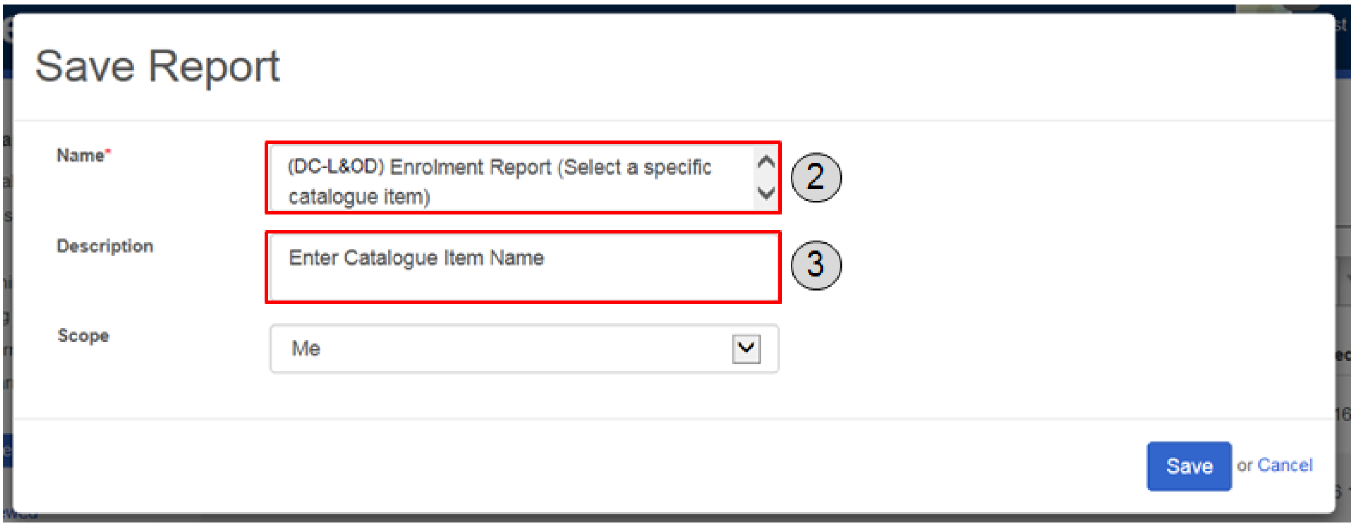
Once you have run a report, the results screen has an option at the top that allows you to **Save** the **Report.**

Saving a newly created report

1. Click **Save Report.**

2. In the Save menu enter a **name** for the report. See [Report naming conventions](#)

3. Enter a short **description** that best describes the use of the report e.g. Enter Catalogue Item Name.



You can limit the scope of this report by selecting from the **Scope** drop-down list. This restricts who can see and run the saved report. **Always select *'Me and others'* and add the *'Tenant Administrator'* as a filter to allow the iLearn Administrators to access your report.** This enables the iLearn Team to assist you with any questions you have regarding your reports.

4. Click the **Scope** drop-down list and select **'Me and others'.**
5. Click **Add filter.**
6. Click the **Field** drop-down list and type the word ***'role'*** and select **'Role'** (displayed under System Details).

7. Leave the **Operator** default as **'='.**
8. Click the **Value** drop-down list and type the word ***'tenant'*** and select **'Tenant Administrator'.**

   To add another filter, click the **Add filter** button (5) again

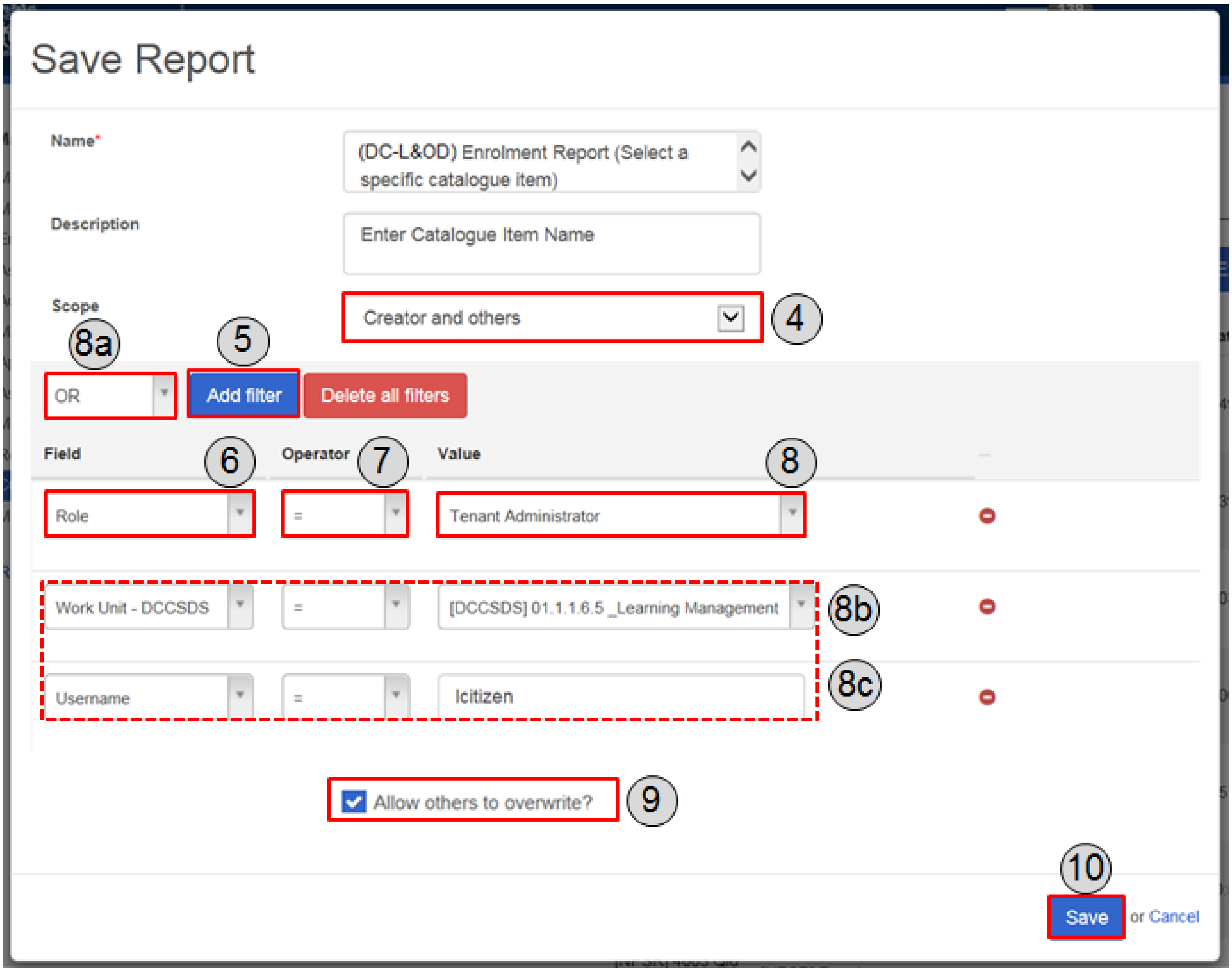
   a) Click the drop-down list and select **'OR'**.

      Populate the **Field** (6), **Operator** (7) **and Value** (8)

   E.g.:

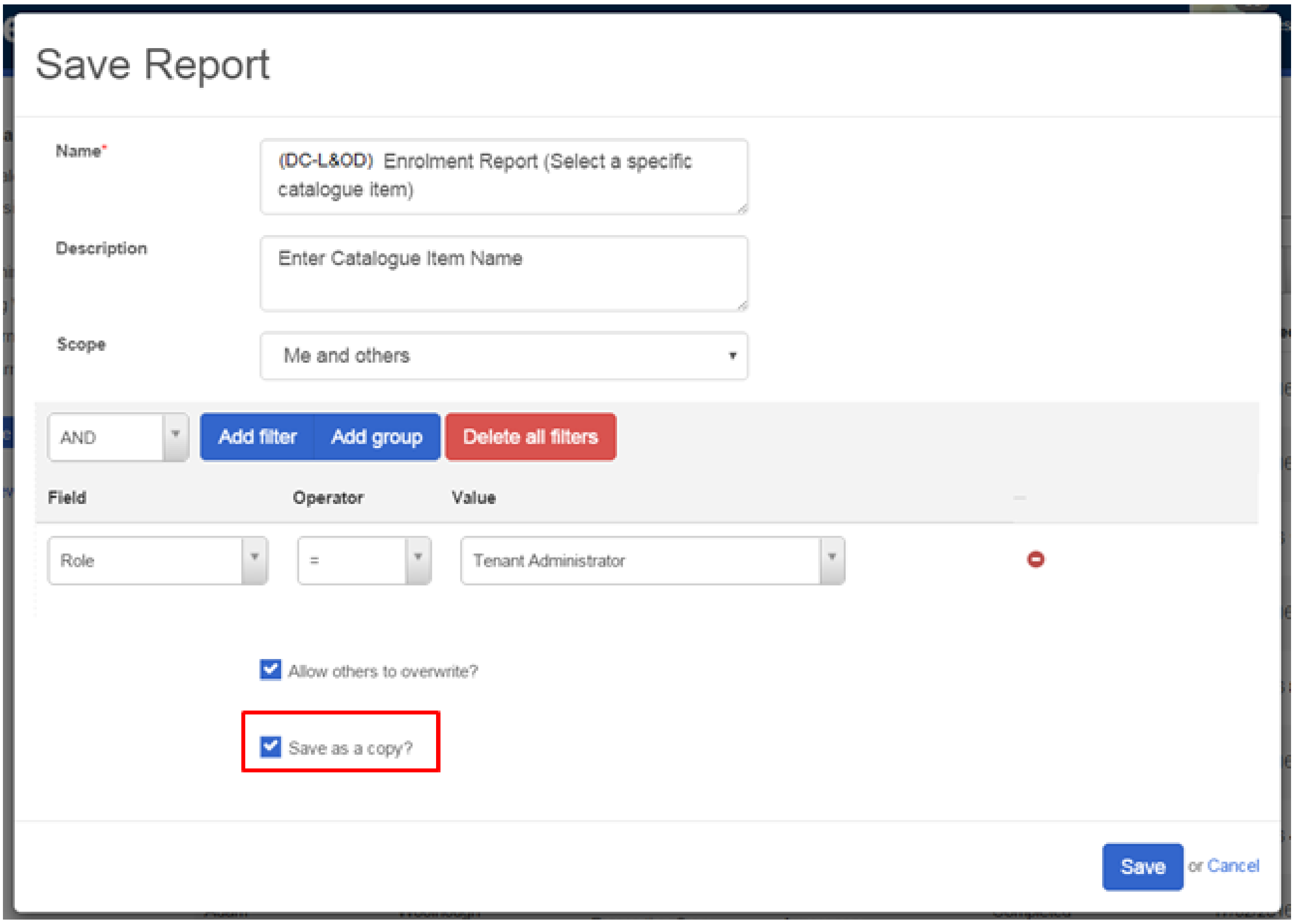
   b) **'Work unit – DCCSDS' '='** (select from the drop-down list) – Use this option to give permission to all users in your work unit. If you are from a department other than DCCSDS, you will select e.g. Work Unit – NPSR etc.

   c) **'Username' '='** (enter the user's username) – Use this option to give a specific person permission to the report.
9. Leave **'Allow others to overwrite'** ticked. This allows others with CA accesses that have permission to access the report the ability to refine it and save it as a copy if needed.
10. Click **Save.**



Saving a refined/edited report

If you have reached the below **Save Report** screen through refining (editing) an existing report, you can save the report as a copy (rather than overwriting the existing one) by checking the **Save as Copy** checkbox underneath the Scope options.



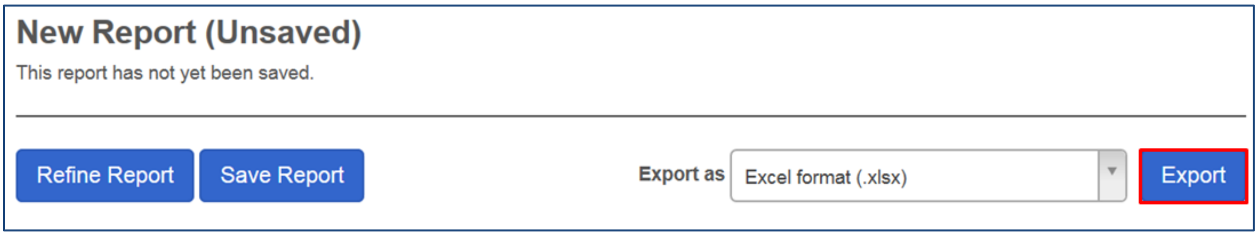
Report naming convention

Your report name should start with your code in curved brackets and the report type e.g. *(DC-L&OD) Enrolment report (Select a specific catalogue item)*. The code in front of the report name allows for easy identification of ownership and also makes it easier to search for.

Export the report results

Exporting report results to Excel

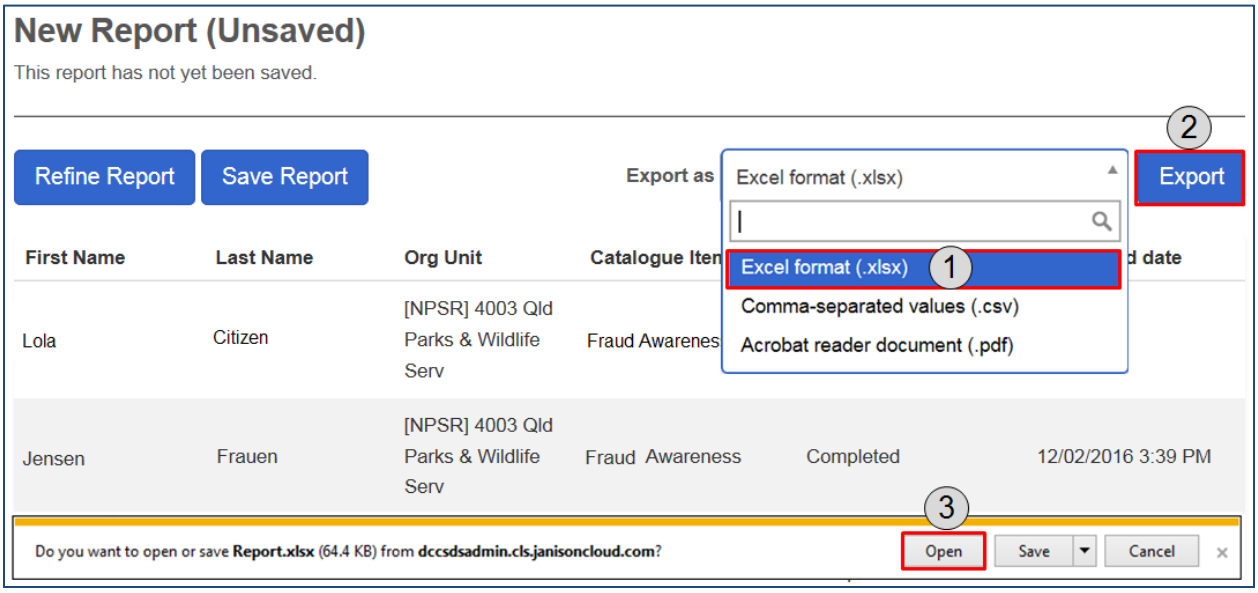
Once you have run a report, the results screen has an option at the top that allows you to **Export** the results to a file.



The results can be exported in the following formats:

- Microsoft Excel
- CSV (comma separated values)
- PDF (Acrobat reader)

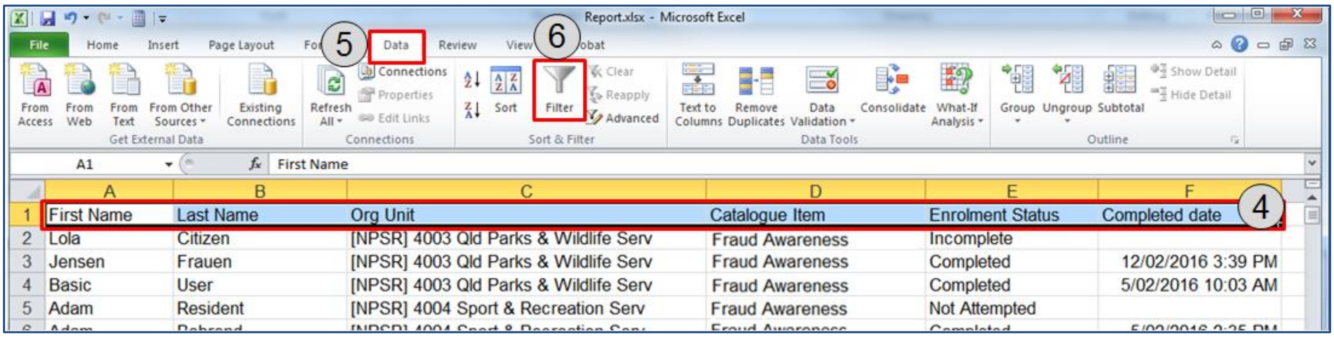
1. Click and select the required format from the **drop-down** list. In this example *'Excel format (.xlsx)'* has been selected.
2. Click **Export**.
3. Click **Open** to open the report in Excel (this screen normally pops up at the bottom of your screen).



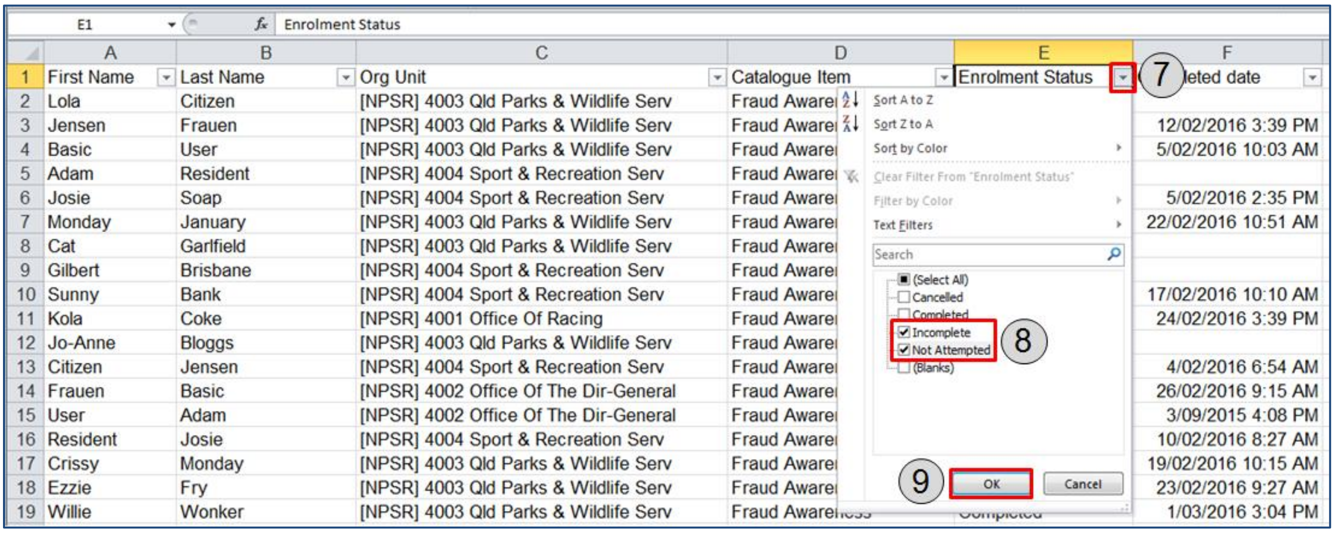
Once your results are exported to Microsoft Excel, you can apply filters to column headings to further refine your results as follows:

Applying filters in Microsoft Excel to the exported results

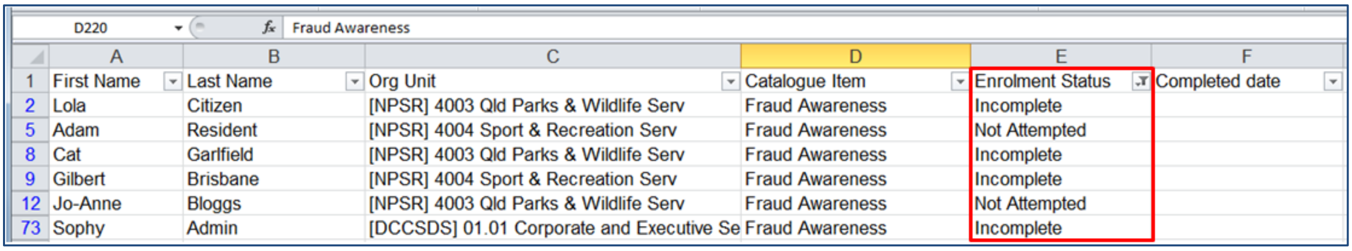
4. Highlight the first row that contains the column headings
5. Click **Data.**
6. Click **Filter.**



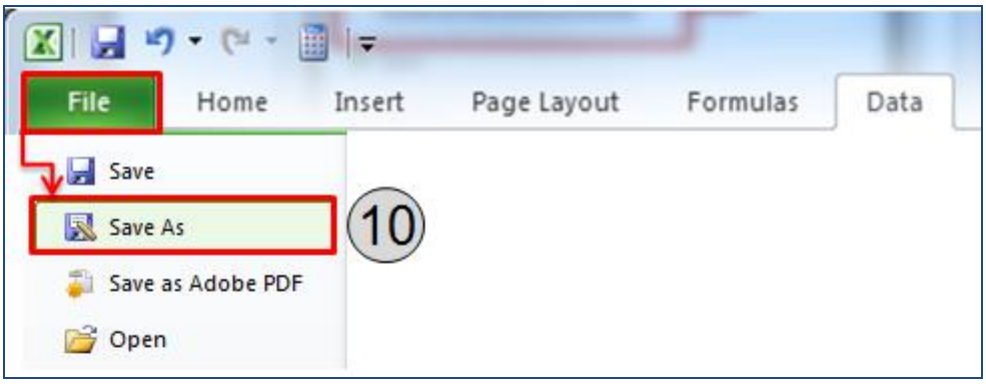
7. Click the **drop-down arrow** next to the column heading name of your choice. In this example *'Enrolment Status'* has been selected.
8. Click on the **Text Filters** you want to exclude from the results to un-select them. In this example the filters *'Incomplete'* and '*Not Attempted'* have been left checked.
9. Click **OK**.



The report results have now been refined to display only users with an Enrolment Status of 'Incomplete' and 'Not Attempted'.



10. Click **File**, **Save As** if you are required to save the report results. Always include the date the report was exported from iLearn in the File name to be saved.

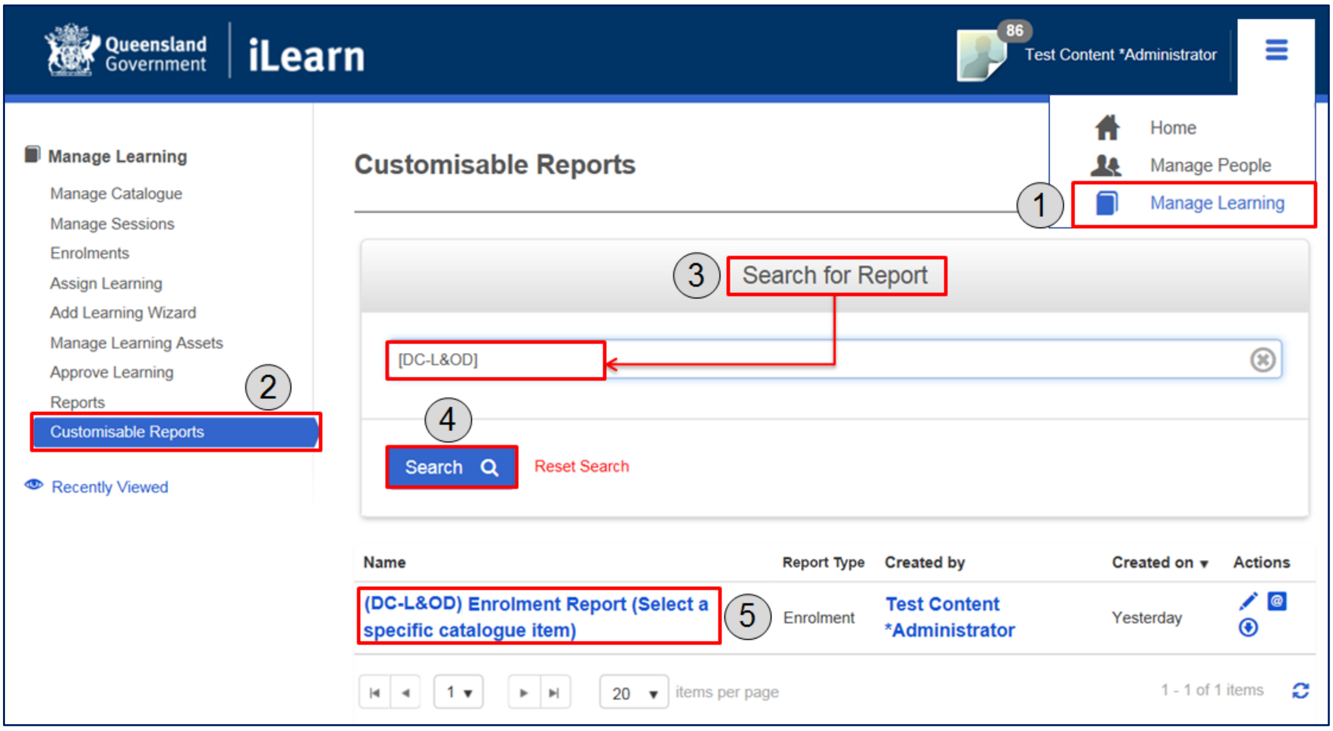


Manage a custom report

You can run and refine (edit) a custom report that has previously been created and saved. You can also refine/edit the report and schedule it to be run automatically.

Locate and run a previously created report

1. Click **Manage** Learning
2. Click **Customisable Reports**
3. Click **Search for Report** and Enter **report name** or key phrase
4. Click **Search**
5. Click the **name of the report** to run the report

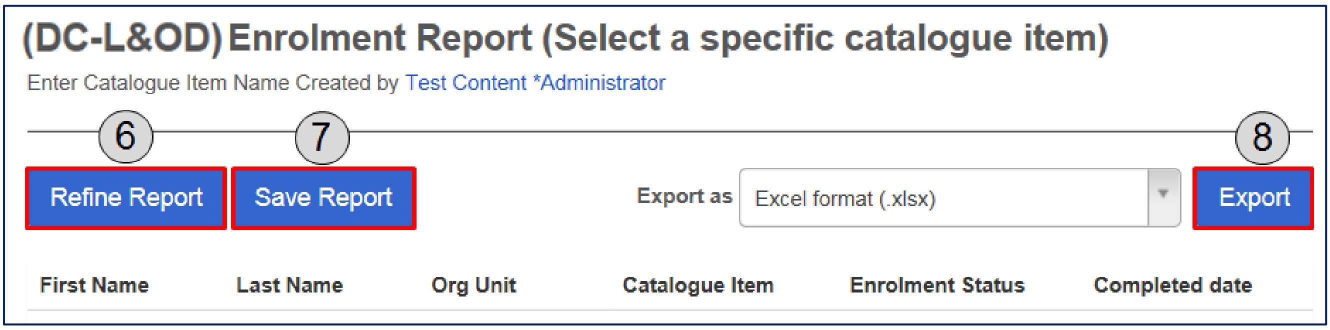


When you click the name of the report, it runs and the subsequent screen shows its results.

The top of the results screen offers three options:

6. Click **Refine Report** to inspect and edit the report instructions (e.g. modify the details selected or change the filters). Make any required changes; see below Refine/edit a previously created report for details.
7. Click **Save Report** to save the report. If you have not previously made any changes this is not necessary. See Saving a refined / edited report for details.

8. Click **Export** to export the results of your report to your computer's Downloads folder. The default format is an Excel file (.xlsx). If you click the box to the left you can export to other formats: Comma-separated vales (.csv) and an Acrobat reader document (.pdf). See [Export the report results]() for details.



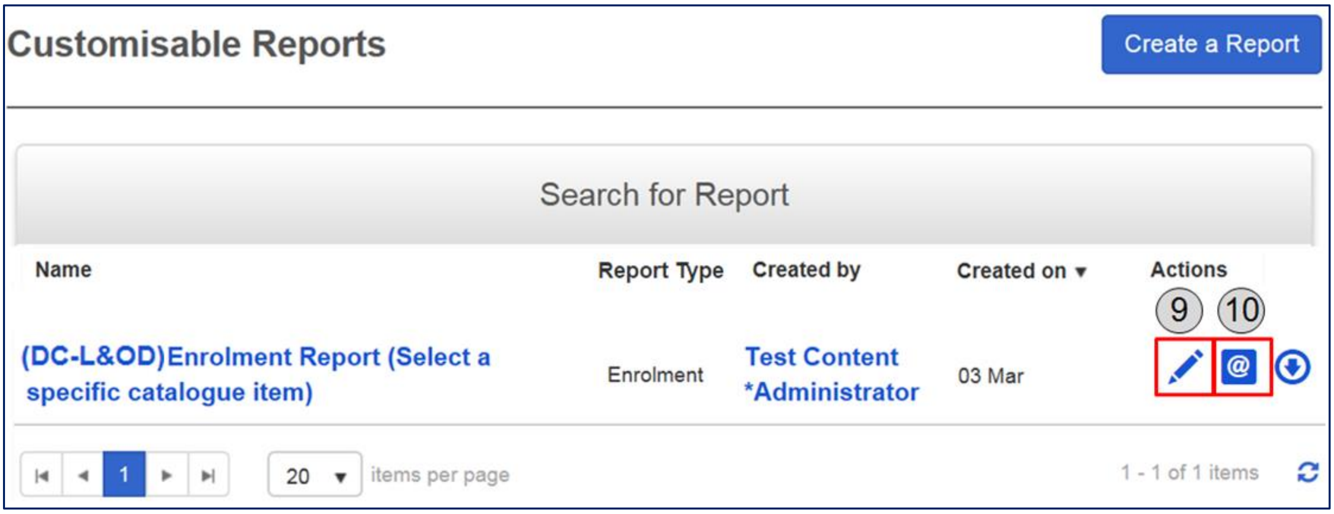
After you have located a report in the Customisable Reports screen (above steps 1- 4) you can:

Refine/edit a previously created report

9. Click the **pencil** icon. This takes you to a screen where you can change the components of the report. See [Create a custom report]() for details.

Schedule the report to be run and emailed

10. Clicking the @ icon takes you to **Schedule a Job** in Settings where you can specify when the report should be run and who is emailed the result. Note that if you want the report emailed to more than one address, insert a semicolon between the addresses.



Building filters introduction

You can set up rules to precisely define **parts** of the report type you have selected. These rules are called **filters** in iLearn. They can precisely select a specific data set of a report type because they are combined using Boolean logic, which can also be nested. This will be best understood by someone who is comfortable with:

- Boolean operations (AND, OR, NOT),
- its language (e.g. “!” means “NOT”), and
- how nesting limits scope

Boolean Operators are simple words (AND, OR, NOT or AND NOT) used as conjunctions to combine or exclude keywords in a search, resulting in more focused and productive results. This should save time and effort by eliminating inappropriate hits that must be scanned before discarding.

Reference: http://libguides.mit.edu/c.php?g=175963&p=1158594

What to look for

Boolean operators form the basis of mathematical sets and database logic.

- They connect your seach words together to either narrow or broaden your set of results.
- The three basic boolean operators are: **AND**, **OR**, and **NOT**.

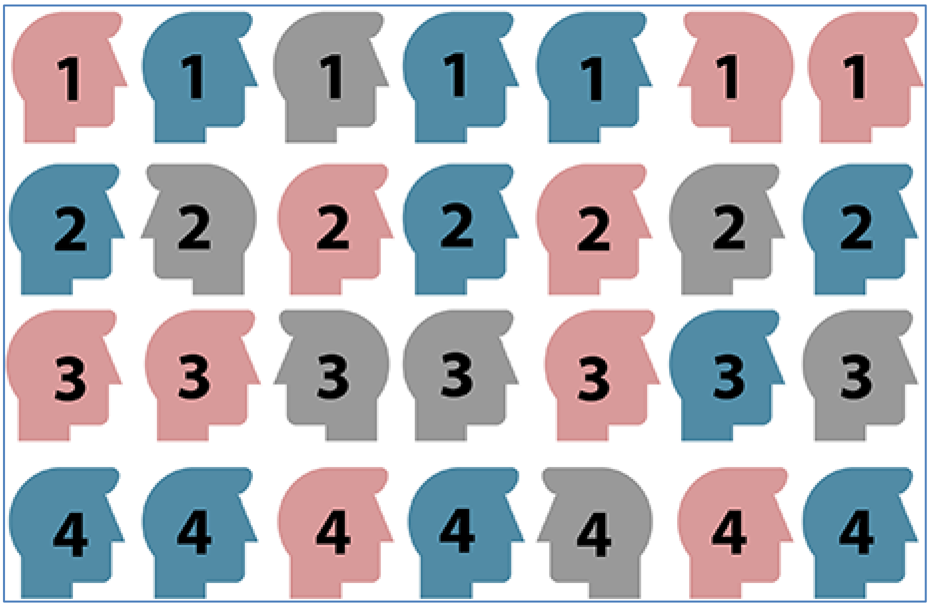
Why use Boolean operators?

- To focus a search, particularly when your topic contains multiple search terms.
- To connect various pieces of information to find exactly what you're looking for.
- Example:
  second creation (title) AND wilmut and campbell (author) AND 2000 (year)

If you understand these go straight to Building filters, otherwise start with an Easier introduction to filters.

Easier introduction to filters

Consider a group of items with **different colours** and **labels**:

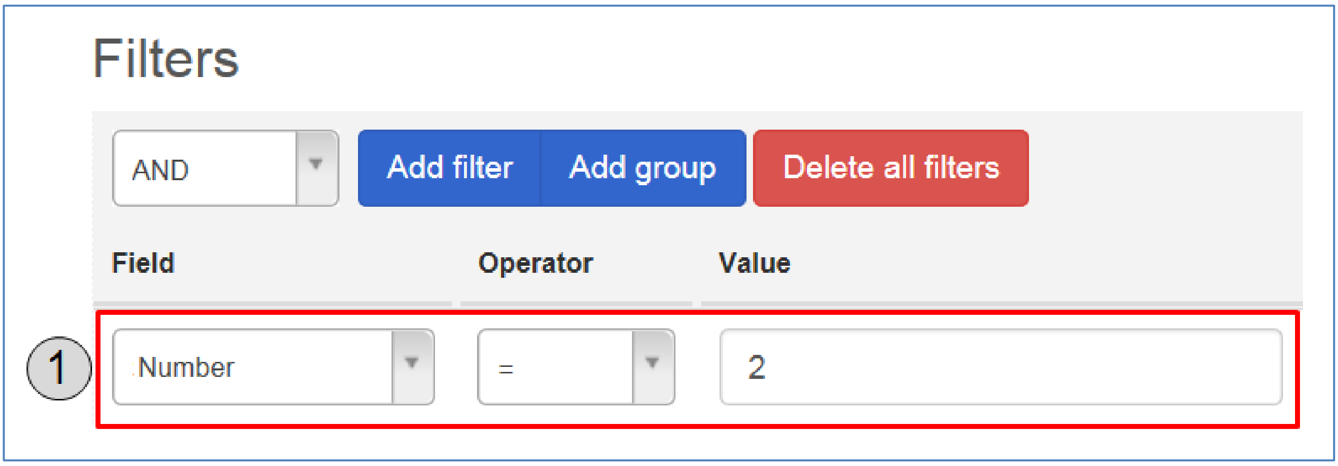


If we select all the items that have the **number 2** we would only see:

In iLearn we express this kind of selection as a ***filter*,** which is another name for a logic rule.

To apply a filter to only select the items that have the number 2, we have entered:

1. A rule (filter) that **Number = 2**. Refer to screen capture below.



Perhaps we want to select all the items that:

- are blue, **AND**
- have the number 2.

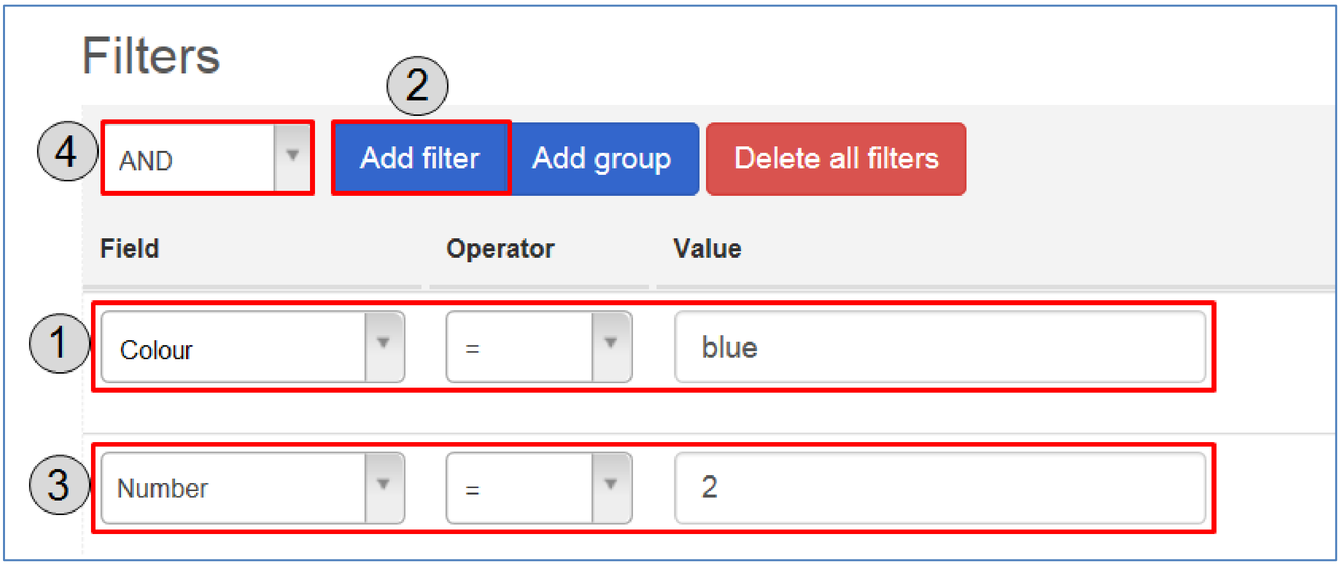
This selection results in a smaller number of items and we see:

To only select the items that are **blue AND** have the **number 2** we would express this as:

1. A rule (filter) that the colour is blue.
2. We clicked **Add filter** to make a second rule
3. Another rule that the number is 2.
4. How to combine these rules was set at the top left hand side: **AND**, that is, both rules have to be true for the item to be selected.

In iLearn the screen looks like this:

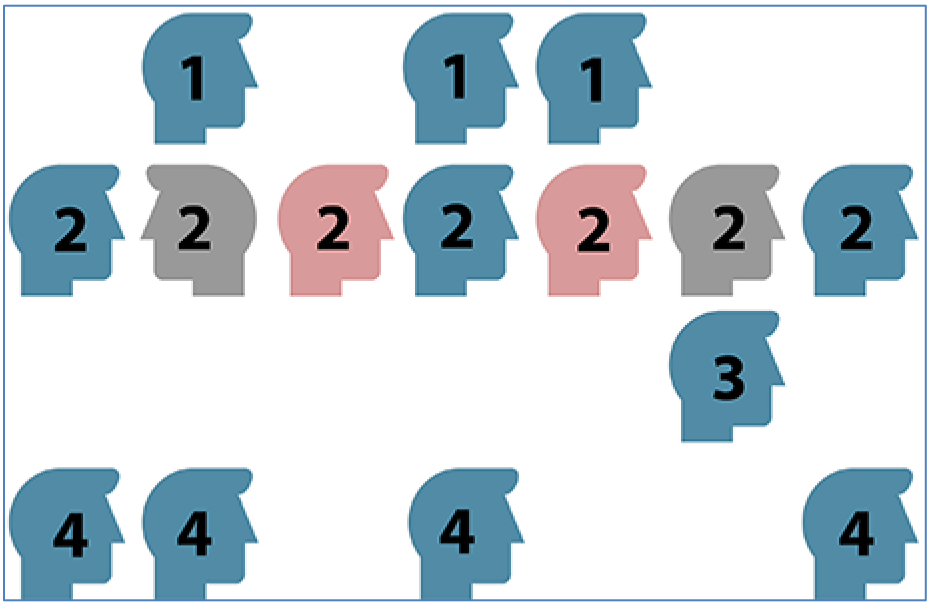
Note that the filters (rules) are aligned at their left.



What if we want to change things and select all the items that:

- are blue, **OR**
- have the number 2

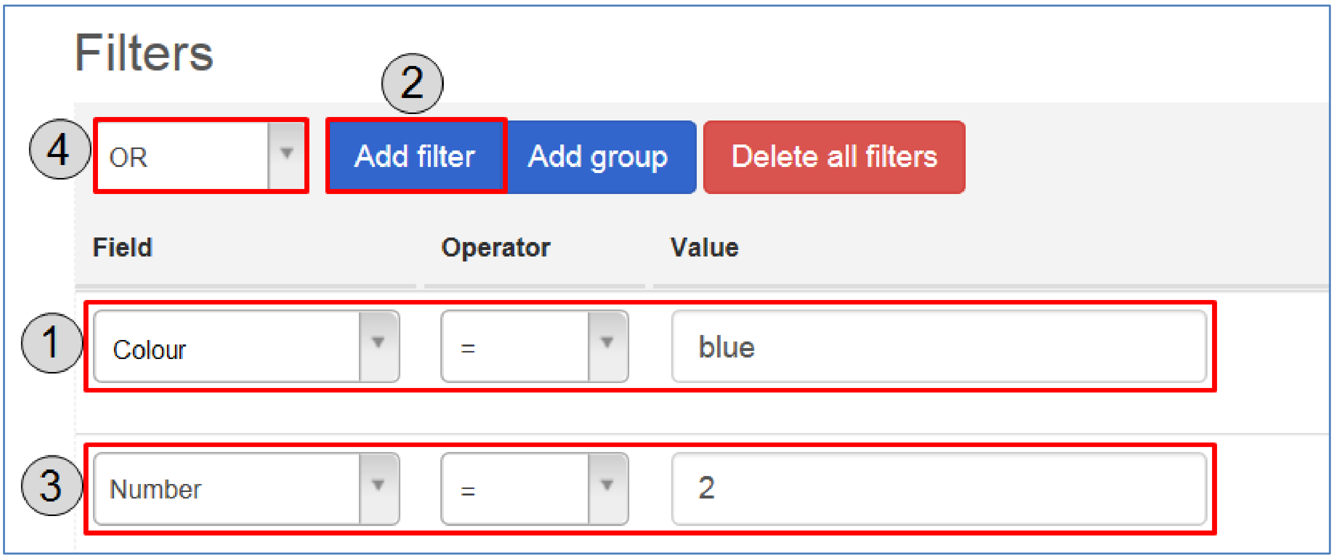
We would see a lot more items this time because now ***either* rule has to be true**, not *both* of them:



To select the items that are **blue OR** have the **number 2** we would express this as:

1. A rule (filter) that the colour is blue.
2. We clicked **Add filter** to make a second rule
3. Another rule (filter) that the number is 2
4. How to combine these rules was set at the top left hand side: **OR**, that is, at least one of the rules has to be true

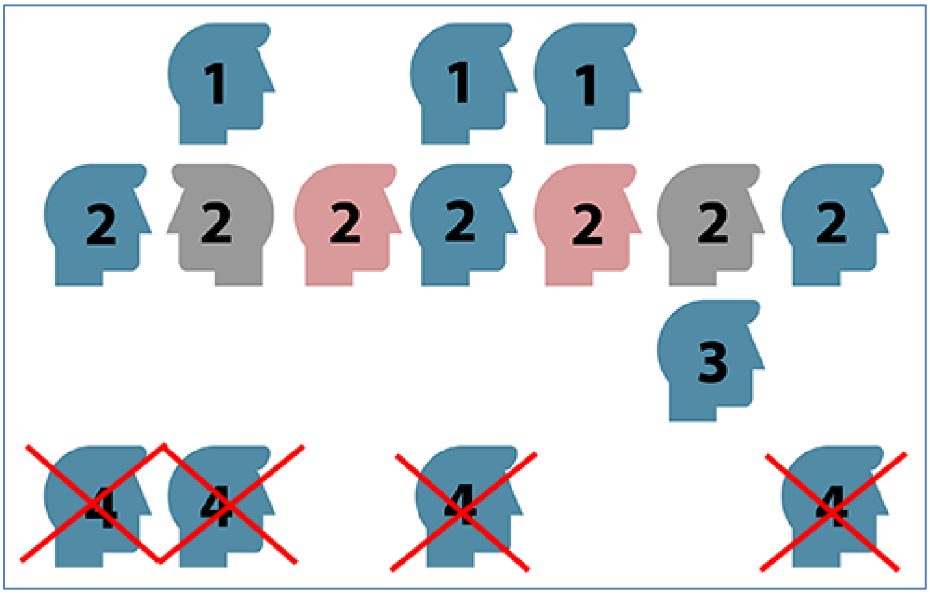
This looks very similar to the previous example except that this time **AND** has been replaced with **OR** at the top left hand side (**4**).



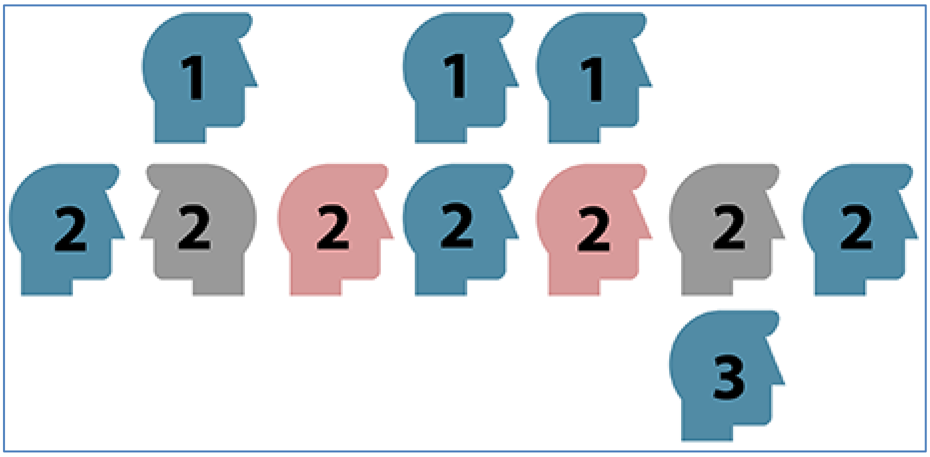
Now we know how to set up simple selections in iLearn by using Filters. We can create one rule or we can create more than one rule (filters) and we specify how they should be logically combined. There are only two choices for the combination:

- **AND**: all of the rules must be true.
- **OR**: at least one of them must be true.

What if we had a more complicated selection to specify? What if we wanted to eliminate the bottom line (i.e. number = 4) from the selection above?



If we did this, we would just see:



To specify this selection we need to change our rules because this time we want to select all the items that:

- have the number 2, **OR**
- are blue *but* the number is not 4

Things are getting more complex. The solution is to start **combining the rules into groups**. We can still keep the first rule we had before, i.e.

- the number = 2

But the second rule has to become a *combination* of rules, i.e. a group composed of:

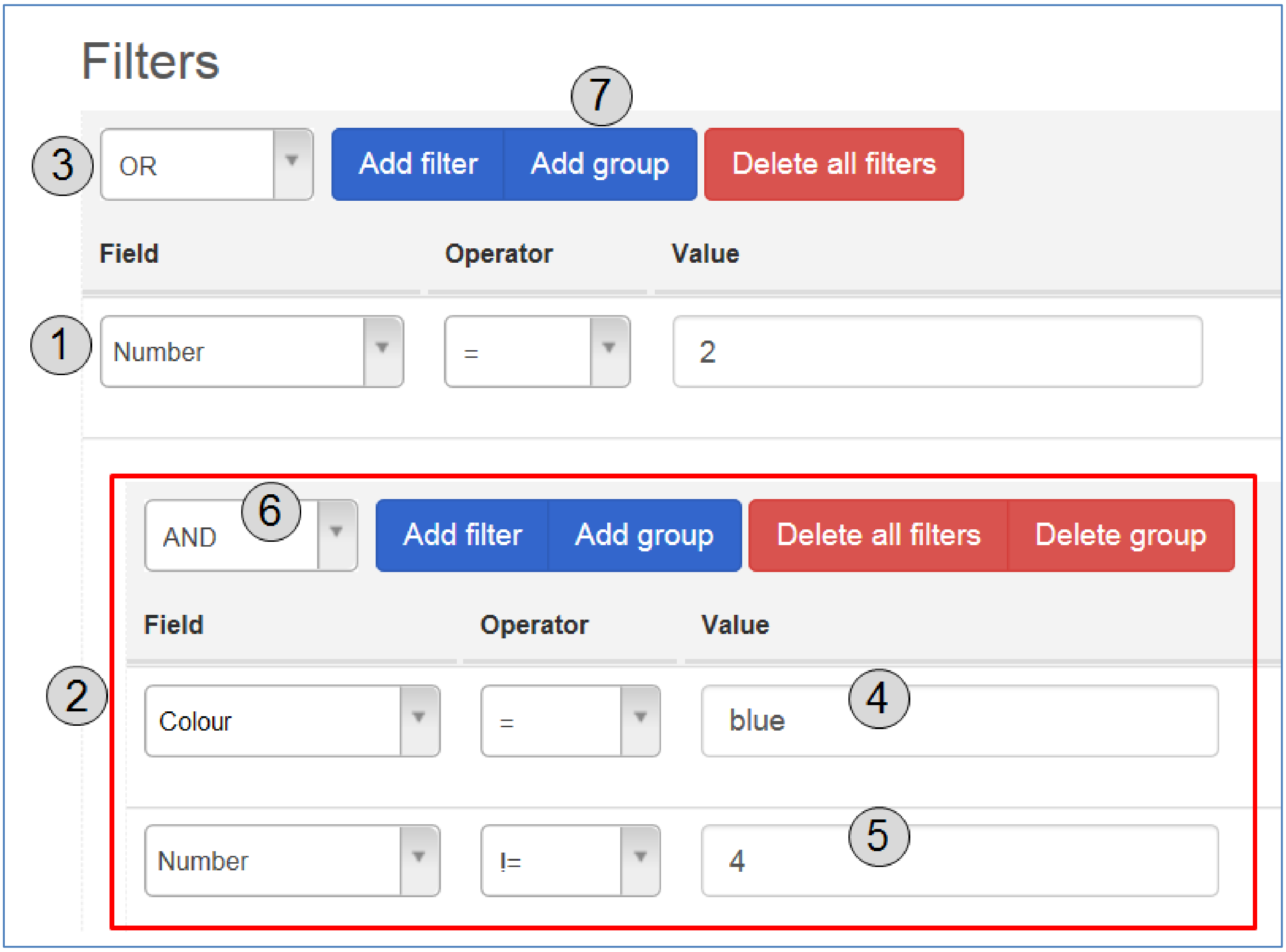
- the colour is blue, **AND**
- the number is not 4

iLearn manages this with a rule group. You click **Add group** (**7**) to create a group of one or more rules. iLearn moves the rules in this group over to the right a bit.

As the screen capture below shows, within the **group** of rules (**2**) we have entered:

4. A rule that the colour is blue.
5. Another rule that the number is not equal to 4 (**!=** means *not equal*).
6. How to combine these: **AND**, that is, they both have to be true.

This group of rules (**2**) is a kind of standalone unit. It is evaluated separately and then combined with the rule(s) above it.



So the main elements in the screen capture are now:

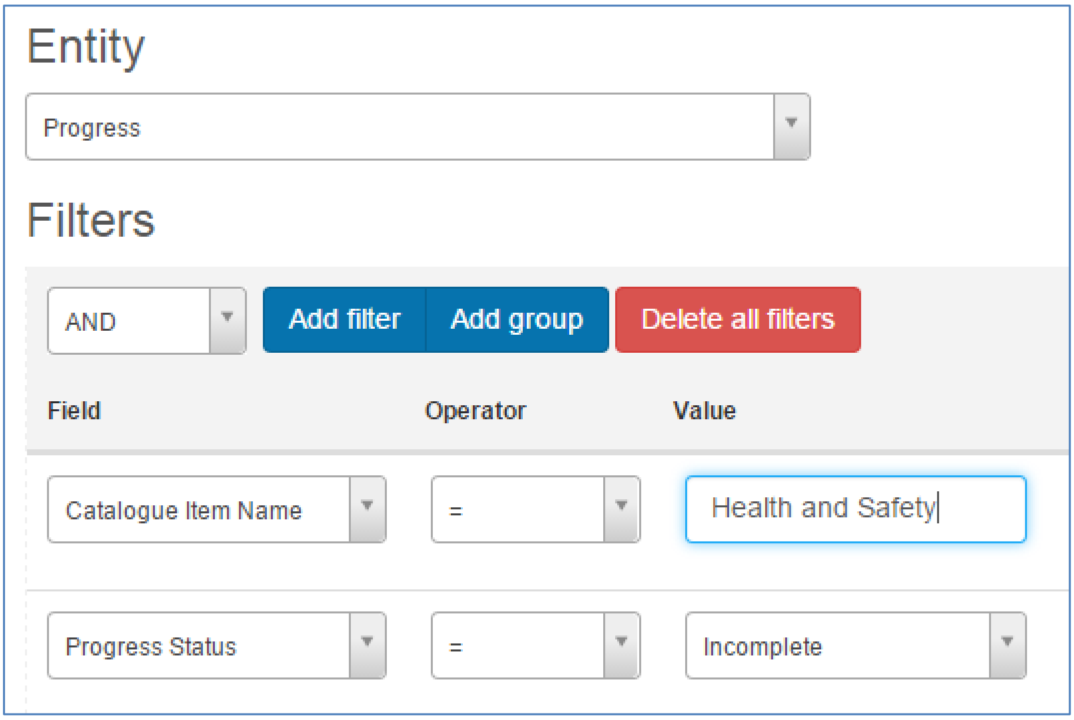
1. A rule that the number = 2 (as before).
2. Our rule group (collection of rules) that is evaluated separately (to be true or false).
3. How to combine these two: **OR**, that is, at least one of these two has to be true.

Notice that the rule group is indented to the right of the rule(s) that it is combined with.

You have now seen *all* the elements that you need to understand in order to use filters confidently. You will find that it gets easier after you have tried a couple of examples for yourself.

You may also have observed that at the very top level, without ever clicking **Add group**, you were actually creating one *master* rule group, i.e. a combination of rules and a way to logically combine them. You may also have guessed that you can create rule groups inside rule groups that are inside rule groups, and so on, if a *really* targeted selection must be made.

But what are the practical uses of filters in iLearn? One example is when you want to find out who hasn't completed a certain Program. You can go to Customisable Reports, select the **Progress** report type, create two filters and combine them as below. This will select Progress items where the Catalogue item is "Health and Safety" **and** the Progress Status is Incomplete. A custom report can list the desired User and progress details for every one of these.



You should now be ready to read the details about filters in iLearn (see Building Filters). But first…

A joke about filters

A Boolean logician has a baby. Her workmate phones and asks if it's a boy or a girl. The logician replies "Yes!"

As we have seen, the Boolean **OR** has a different meaning from the everyday usage of the word. In the Boolean world (that filters exist in), if either is true, then the whole statement is true.

Building filters

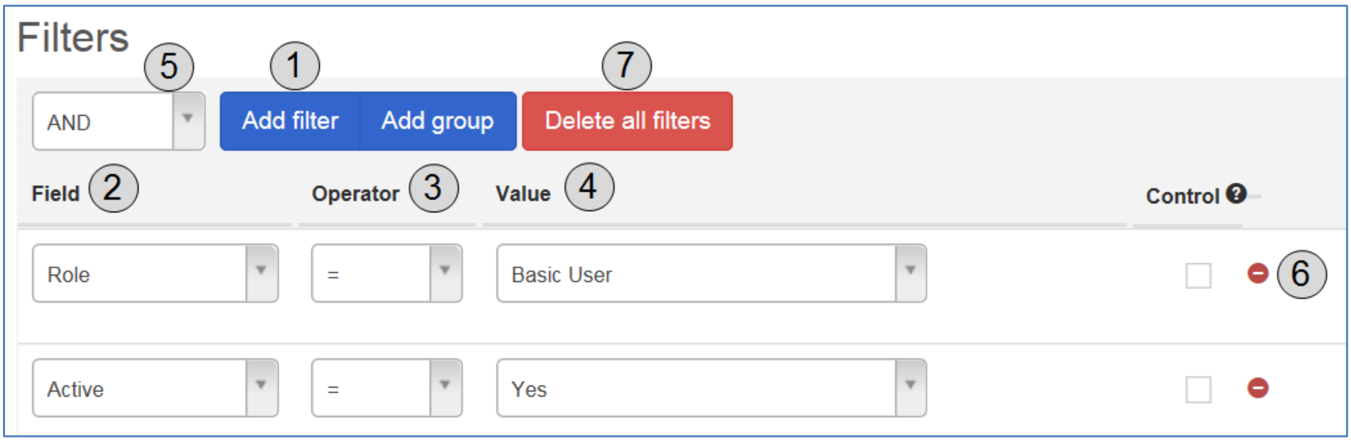
Note that an alternative to using filters is to [export]() the results of your report to an Excel file. In Excel you can do filtering and manipulation of the data

Filters can be applied to report types in a number of contexts. This explanation uses the example of reporting on the **User** report type. We are building a set of rules and combining them together logically in order, to select certain Users.

Simple filters

To build a filter:

1. Click **Add filter** to create a rule
2. Choose a **Field** (for example ‘Role’) from the drop-down box. The fields available will change depending on which report type is being filtered.
3. Choose an **Operator** (for example ‘=’)from the drop-down box in the middle
4. Type a value in the box at the right or select a value from the drop-down list (for example ‘Basic User’).
5. You have now built a rule. You can add another rule (filter) to this top-level rule Group by clicking the top **Add filter** button (**1**) again. Notice that this new rule (Active = Yes) lines up with the first rule. Depending on what is selected at the top (**5**), you are now specifying Users for whom both of these rules are true (AND) or else Users for whom either of the rules is true (OR).
6. You delete a single rule (filter) by clicking the **minus** icon at its right hand side.
7. You can delete all the rules by clicking **Delete all filters**.



Thus, the screen capture above shows a set of rules that when applied to Users selects those who:

- Have a Basic User Role, **AND**
- Are active *i.e. have an active iLearn account* (Active = Yes)

<u>Extra note about **Value** (4):</u>

In some cases, for example when you have specified that 'Active =', you will be provided with drop-down choices, in this case yes or no.

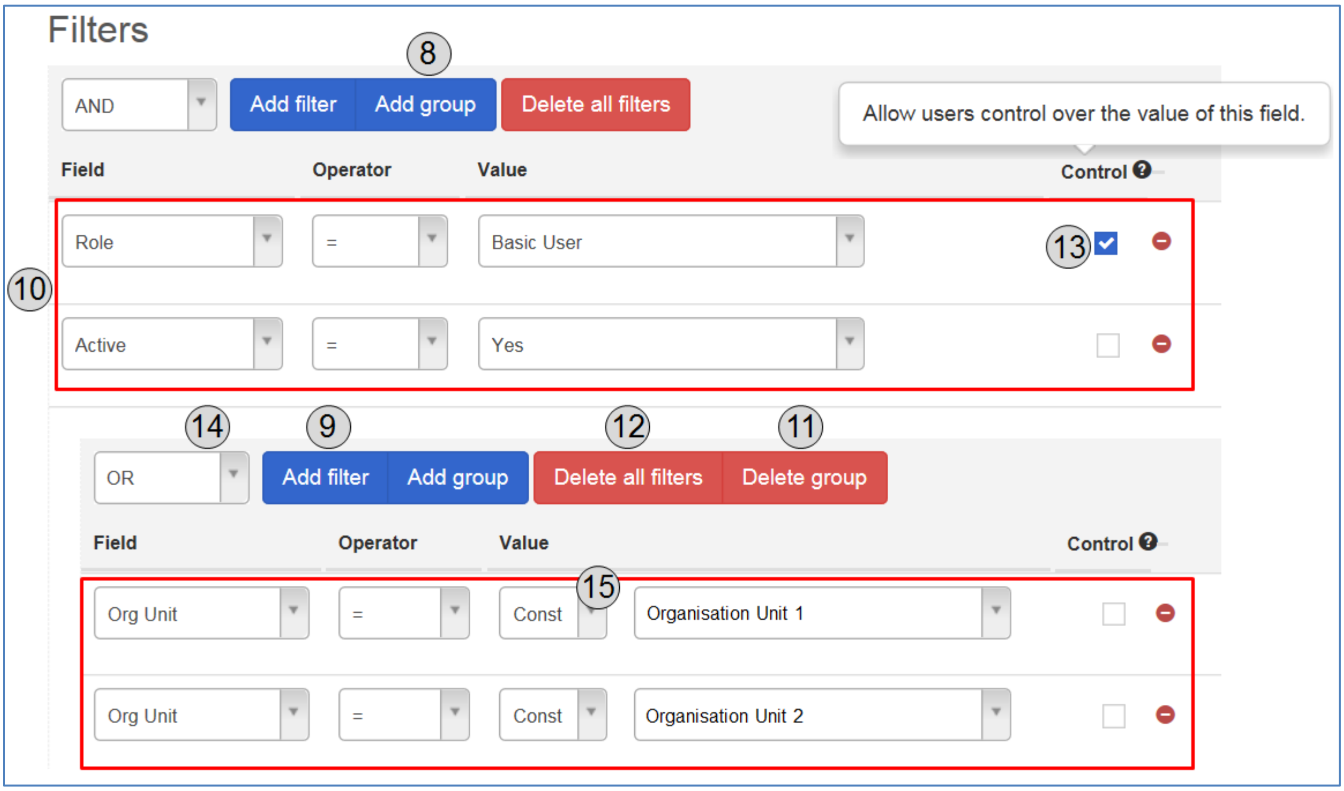
In other cases, for example when you have specified that "Org Unit =" (see **15** in the below screen capture), an additional drop-down box will appear with Const and Param as choices. You select:

- **Const** to indicate that you are specifying a **value** in the right hand box; you select.
- **Param** to indicate that you are specifying a **characteristic** in the right hand box.

In this example, choosing *Const* means that the box displays actual Org Units to select.
Selecting *Param* means that you can choose a relationship, i.e. your own Org Unit.

Complex filters / rule groups

8. You can make rule groups by clicking **Add group**. This makes it possible to logically build a complex set of filters (but it does require a more technically-oriented person).
9. After you have clicked Add group (**8**), new fields and buttons will then appear. You then click the local **Add filter** button (**9**) to start create rules for this rule Group. In the example below the rules in the rule group will be logically combined together using OR (**14**), that is, at least of them must be true.
10. The outcome of this rule Group will be logically combined with the other rules listed just above it (at **10)**, i.e. those rules at the same level.



This functionality, which can be repeated and combined numerous times and ways, means that rules can be nested in rules that are nested and combined in rules, and so on, leading to highly detailed specifications. As discussed, these are best set up by people, such as programmers, who can design the nested IF statements required.

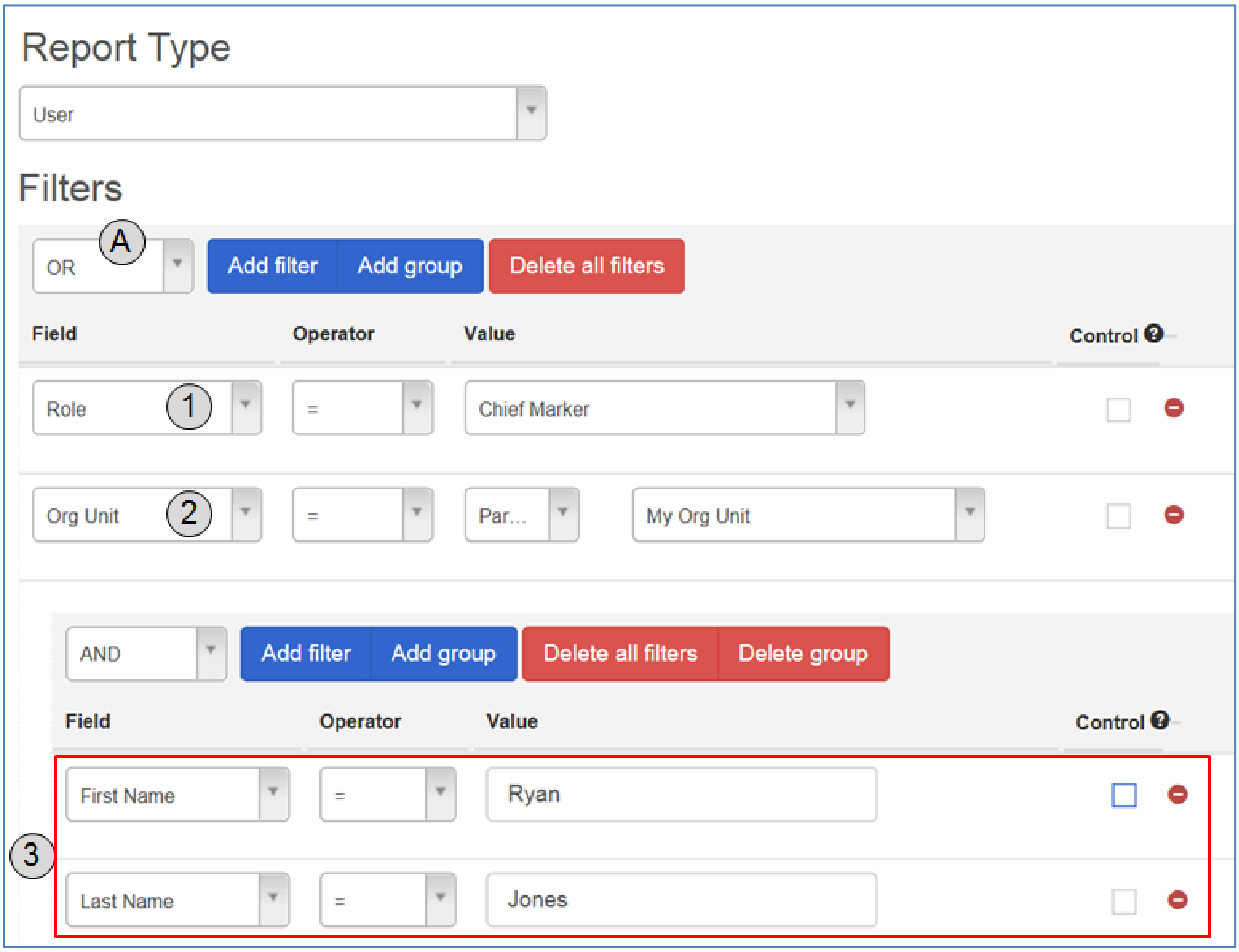
11. You delete a Group of rules by clicking **Delete Group**.
12. You can delete all the rules (filters) in a Group by clicking **Delete all filters**.
13. Click the **Control** Checkbox next to a rule, if you want the report to pause when it is run to allow this value to be entered.

Thus, the above screen capture now selects those Users who:

- Have a Basic User Role, and, AND
- Are active, AND
- Are in either Organisation Unit 1 **OR** Organisation Unit 2.

For another example of a targeted set of filters, the screen capture below specifies all Users who:

1. have a Role of Chief Marker, OR
2. are in the Org Unit of the User requesting the report OR
3. have the first name “Ryan” **AND** the last name of “Jones”



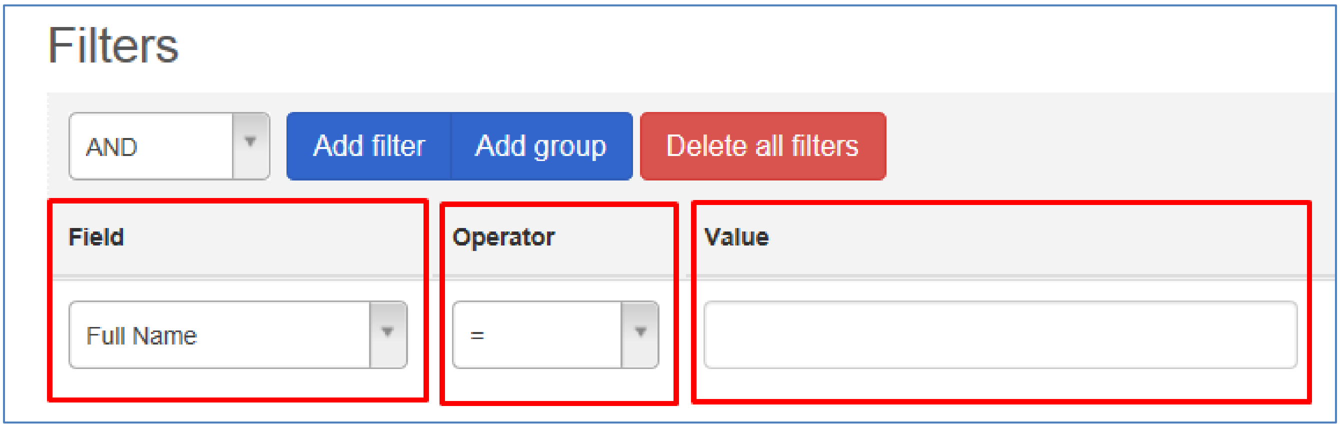
Note that if the top level field (marked **A**) was set to "AND" instead of "OR", then the only User(s) selected would:

- have a role of Chief Marker, and
- be in the requestor's Org Unit, and
- be named "Ryan Jones"

More details about filters

Filter items

A Filter item takes a **Field**, an **Operator** and a **Value** to compare with.



The Field is either a field available directly on the report type (e.g. User's Last Name), or a Custom Attribute.

The following fields are available to participate in filtering at the User level:

- Organisation (select from drop-down or match on Organisation name).
- Organisation Unit (select from drop-down or match on Organisation Unit name).
- Main Role (select from drop-down or match on main role name).
- Last logged on, Last Active, Created – Date Fields related to the user's account and activity.
- Custom Attributes – note that it's possible to specify filters against custom attributes, including Boolean values, string values etc. This makes it possible to create reports targeted at specific demographics.

Operands

Operands are the logical operations. Depending on the datatype of the Filter Property, different operands are available. For example 'contains' cannot operate on a Date Type, but it can operate on a Text String. Below are the operands available:

- = - Equals, available on all data types.
- != - Does Not Equal, available on all data types.
- Greater than, available on String (alphabetical order) and Numerical types
- Contains - Contains operator, only available for Text String Data Type.

- After - Same as Greater than operator for Data Type.
- Before - Same as Less than operator for Data Type.

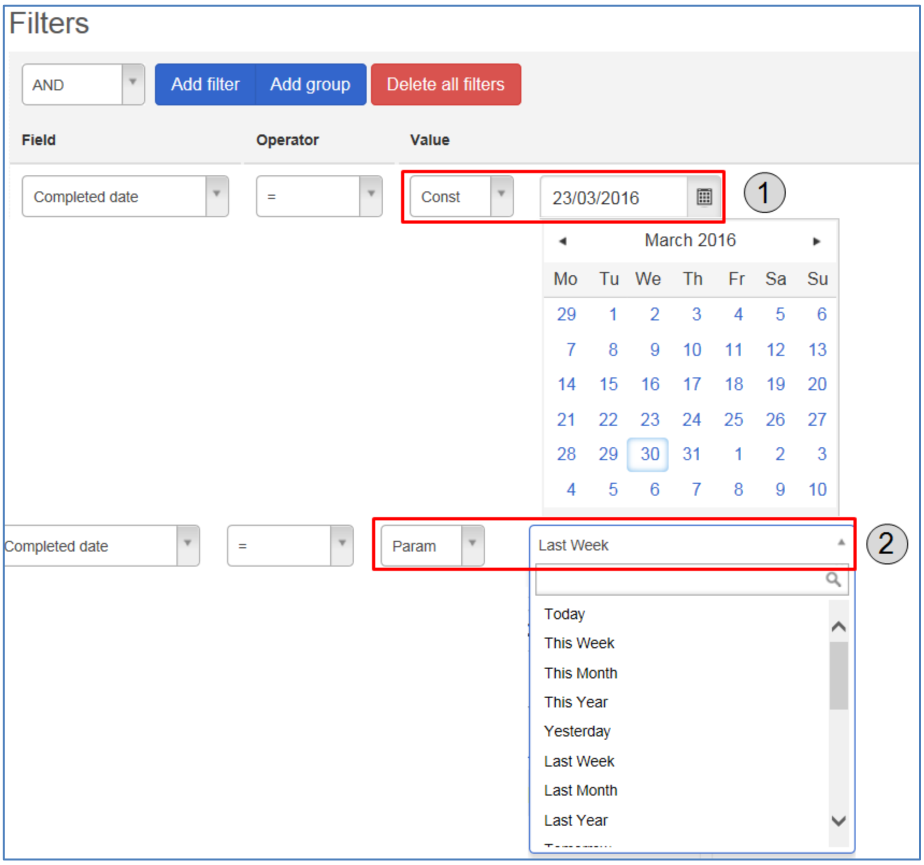
Value to Compare with

The Value to compare with appears in the third column, and changes its input control depending on the data type. For example, for Date Types, it would show a date picker, and for Text it would show a text box. This is the value that the report will use in the filter item to compare with.

Parameters

Some data types support parametric comparison values rather than explicit values. For example, it's often useful to run a report of Users that completed courses during the last week.

1. Rather than selecting a 'hard' date (which would need to be updated each time a report is run),
2. it's possible to select a parameter: "during the last week".



Comparison values (i.e. Const and Param) are only available for Date Type properties, Org Unit and Organisation. This means that if the **Field** is Date related, refers to an Org Unit or Organisation an extra value box (i.e. Const and Param) becomes available to you.

Example reports

Below are merely guidelines on what filters and details to include when creating your different reports.

The table below can give you a guideline on

What information are you after?	Filter	Operator	Value
Are you looking at all people completing specific Catalogue Items?	Catalogue Item Name	=	Copy the catalogue Item name from the Manage Catalogue menu
Are you looking at a particular org unit or work unit completing specific Catalogue Items?	Org Unit Catalogue Item name or Catalogue Item Code Tag	= = =	Select the org unit from the dropdown Copy the catalogue Item name from the Manage Catalogue menu Select the Catalogue Item Tag from the dropdown

1. Enrolments report

If you are reporting on an organisational unit (Org unit) / region, you can use the filters to narrow down your search to:

- People, by using the filter: '**Org Unit'**, ' **=**' select your org unit / region from drop-down
- Types of training, by using the filter: '**Catalogue Item Name', 'contains'**

If you are a training unit, you can use the filters to narrow down your search to:

- Types of training, by using the filters: '**Catalogue Item Name', '='** *or* **'Catalogue Item Code Tag'**, **'='**

Report Type	Enrolments			
Filters	AND			
Field	**Operator**	**Value**		**Description**
Org Unit	=	Const	[DCCSDS] 01.05 Region Brisbane	Including the Org Unit as a filter allows you to narrow your search to a **specific work unit.**

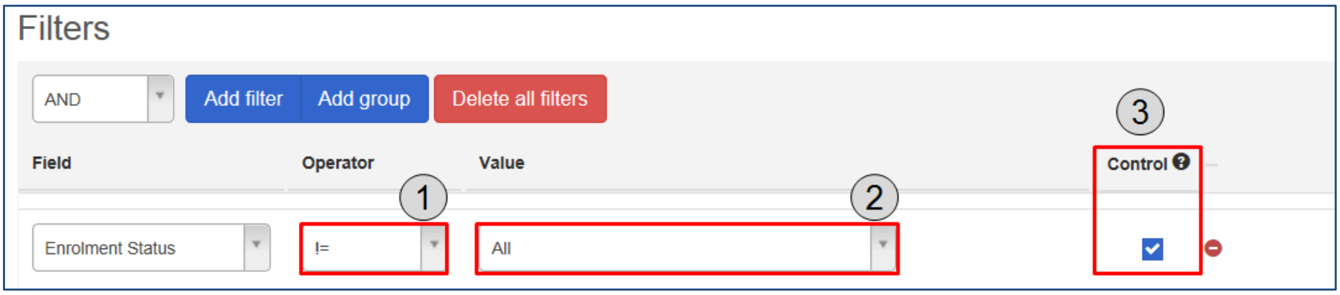
Catalogue Item Name	Contains	*{Enter Catalogue Name e.g. IPMS}*	Including the Catalogue Item Name as a filter allows you to narrow your search to **one specific course**. You can use the brackets {} to type in an instruction for the report user.

Select Columns			**Description**
User Details:	☑	Active	True / False. Shows if the User has an active ('True') or inactive ('False') iLearn account.
	☑	Email	The users email address in iLearn.
	☑	First Name	The user's first name in iLearn.
	☑	Last Name	The users last name in iLearn.
	☑	Org Unit	The users work unit in iLearn.
	☑	Preferred First Name	
Group Types:	☑	Work Unit – xxx	Select work unit for your department
Custom Attributes:	☑	Position	Users job title.
	☑	Classification Number	This users position classification e.g. AO2, PO3 etc.
Enrolment Details:	☑	Catalogue Item	This is the name of the course/learning
	☑	Provider	Provider name. Mostly external but CST & DST is also available as options.
	☑	Completed date	Date the course/learning was completed: For a program this date would be the date that the last component of the program was completed. For online training this date would reflect the date the online training was completed. For a Learning Event this date would reflect the date of the session and not the date when the session was marked.
	☑	Created	Date enrolled.
	☑	Cancelled Date	Date enrolment was cancelled.
	☑	Enrolment Completed	True / False.
	☑	Enrolment Status	This will include: Pending, Declined, Not Attempted, Incomplete, Cancelled, Completed.
	☑	Approx Duration (minutes)	This refers to the timeframe for the course as a whole.
Enrolment Custom Attributes:	☑	Attendance	Historical information from former LMS 'Learning Station' 2007 – 2014.
	☑	Session Name	Historical information from former LMS 'Learning Station' 2007 – 2014.

Note 1:

You can add a filter to the report to give the User the choice to select a specific enrolment status when running the report:

1. Select '**!=**' *(is not)* from the **Operator** drop-down list
2. Select '**All**' from the **Value** drop-down list
3. Enable the **Control checkbox** (to allow users control over the value of the field)



When the above filter details are left unchanged by the User, the filter will include all enrolment statuses in the report results (i.e. Not Attempted, Incomplete, Complete, Cancelled, Declined).

To report on cancelled enrolment status only the User can then select the **Operator '='** and **Value 'cancelled'**

<u>*Note 2:*</u>

Omitting the filter for the Catalogue item Name, will return all courses for your work unit or department.

2. Learning Event Session Attendance report

Report Type	Learning Event Session Attendance			
Filters	AND			
Field	**Operator**	**Value**		**Description**
Org Unit	=	Const	[DCCSDS] 01.05 Region Brisbane	Including the Org Unit as a filter allows you to narrow your search to a **specific work unit.**
Learning Event	Contains	*{Enter Learning Event Name]*		Including the Learning Event Name as a filter allows you to narrow your search to **one specific Learning Event**. You can use the brackets {} to type in an instruction for the report user.

Select Columns			Description
User Details:	☑	Active	True / False. Shows if the User has an active ('True') or inactive ('False') iLearn account.
	☑	Email	The users email address in iLearn.
	☑	First Name	The user's first name in iLearn.
	☑	Last Name	The users last name in iLearn.
	☑	Org Unit	The users work unit in iLearn.
	☑	Preferred First Name	
Group Types	☑	Work Unit – xxx	Select work unit for your department.
Custom Attributes:	☑	Position	The users job title.
Learning Event Session Attendance Details:	☑	Learning Event	The name of the Learning Event. (The Learning Event name can sometimes be different to catalogue item name).
	☑	Venue	Name and address of the training venue.
	☑	Venue Location	Address of the training venue.
	☑	Duration Measure	Length of the session in days or hours.
	☑	Attendance.Session. StartDateTime	Session start date and time.
	☑	Attendance.Session. EndDateTime	Session end date and time.
	☑	Learning Event Session Attendance Status	This will include Pending Approval, Attending, Waitlisted, Did Not Attend, Withdrawn, and Attended.
	☑	Marker Notes	Any notes added to the learner when the session was marked. Note that these notes are visible to the user.
	☑	Provider	Provider name. Mostly external but CST & DST is also available as options.

Enrolment Details:	☑	Catalogue Item	This is the name of the course.
	☑	Completed date	The date the Catalogue item is completed.
	☑	Enrolment Completed	True or False.
	☑	Enrolment Status	This will include: Pending, Declined, Not Attempted, Incomplete, Cancelled, Completed.
	☑	Cancelled date	The date the enrolment is cancelled.

Glossary

Filters

Filters are like logic rules which are applied to precisely define part/s of the report type. It basically narrows and targets your search.

Report type

A report type in iLearn refers to the different components in iLearn you can report on (it is like a report template). E.g. Enrolments, Learning Event Session Attendance, Progress etc.

Report type information

Report type information refers to the data/details attached to each report type you can include in your report. (e.g., First Name, Last Name, Org Unit, Catalogue Item, Status, Completion Date etc.)

Roles

A Role in iLearn is a collection of permissions that refer to a set of actions or responsibilities a User can perform. The Role you are logged in with has a set of permissions assigned to it which restricts or allows access to the menu items in iLearn. If you do not have certain permissions, related menu items will be hidden. Roles range from Basic User, Event Facilitator and Content Administrator.

- **Basic User –** you can search for and enrol into Catalogue Items (courses) under the Browse Learning menu, view and print your learning transcript and certificates of completions under the My Learning menu and access your online Achievement Capability Plan (ACP). You can run reports that have been permissioned to you, but you cannot create reports.

- **Content Administrator (CA) –** this role allows you to perform all the functions a Basic User can perform as well as allows you to create and manage learning assets, create surveys, manage sessions, assign learning, manage enrolments, mark attendance and create reports.

- **Event Facilitator (EF) –** this role allows you to perform all the functions a Basic User can perform as well as allows you to manage sessions, assign learning, manage enrolments, mark attendance and run reports that have been permissioned to you.