CREATE & RUN A CUSTOM REPORT

OVERVIEW

Smart Assessor provides the opportunity for custom reports to be created. Reports are created based on fields held throughout the system.

PREPARATION

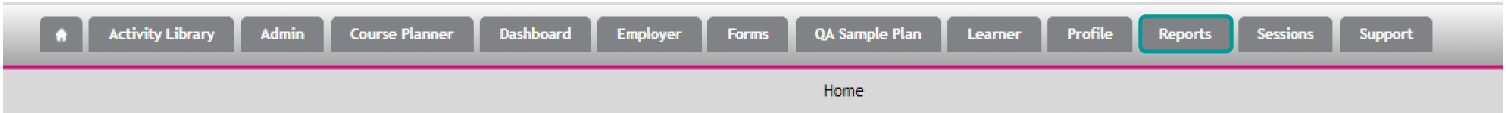
Using two screens can benefit the creation of forms, allowing you to view two documents at the same time.

USER RESTRICTIONS

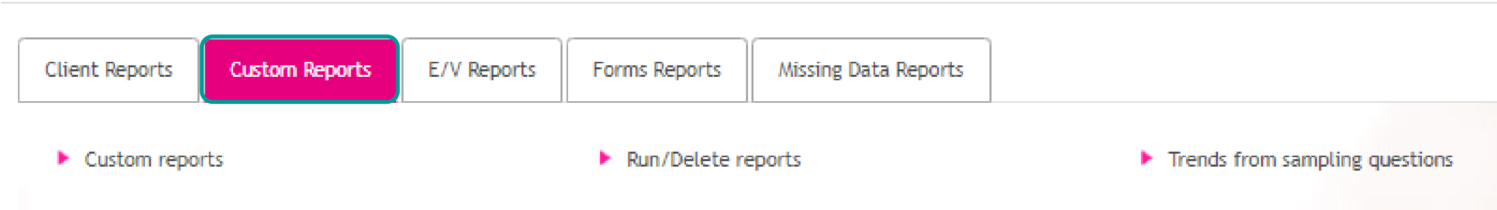
Report options are available to all roles- reporting field options will differ per user role.

DETAILS

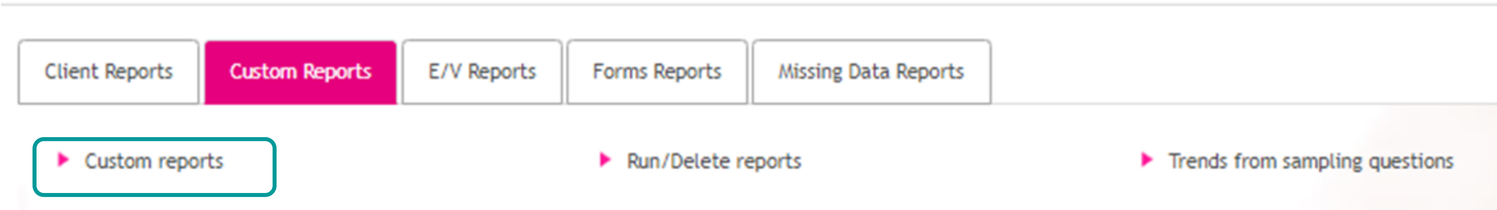
1. Click Reports tab from the grey navigation bar. ***(Note* that dependent on role, Reports tab will display in different locations on the navigation bar)***



2. Click Custom Reports tab.



3. From this page there is the ability to locate created Custom Reports and Run/Delete reports.
4. There is also the ability to look for trends from the IQA sampling questions **(Note* *master admin only option*)**
5. To create a new report, click on the Custom reports option.



6. A list will display providing the opportunity to select the areas a report is required either to run/edit. ***(Note* list options will change by roles)***

Area	Template Name
Assessor	
Assessor session reports	Template for creating reports based around assessor sessions
Second Assessor session reports	Template for creating reports based around sessions whilst acting as a second assessor
External Verifier	
EV overview report	Template for creating reports around Assessors, Learners status and courses
Internal Quality Assurer	
IQA sign-off review reports	Template for creating reports around IQA activity
Learner	
Learner progress	Template for creating reports to track and manage learner course progression.
Learner Session Report	Template for creating reports based around learners sessions
Admin	
Learner registration information	Template for creating reports based on learner registration data
Admin actions	Template for creating reports based around admin actions completed and outstanding.
Employer	
Employer reports	Template for creating reports for employers based around learner attendance at sessions

7. When editing a report which the user has created, the user needs to be in the correct area to run the report- example if a report has been built such as a custom learner session report, the user is required to go back into learner session report to edit the report. To choose a report use the drop down select option and press load.

Open Existing Report

Pick existing report to load -select- Shared Reports Load

8. The report will then load up the reportable fields which were selected on creation. Field option can be unticked/ticked that require editing, there is also the ability to change filters and the order by.

Columns Filters OrderBy

9. To create a NEW report, enter the report name, add a description and select whether the form is to be shared with ***(Note*other roles are able to run reports)***

Save and run report

Enter name to be saved as:	[ ] **Save** **Save and run report**
Description:	[ ] ☐ Share my report

10. Click the Columns tab, select the fields to be included within the report.

Columns | Filters | OrderBy

☐ Attendance Feedback	☐ Branch Code	☐ Business Department
☐ Business Description	☐ Business Location	☐ Company/Employer Name
☑ Course Commence Date	☑ Course End Date	☑ Course Name
☑ Formal Review Overdue	☐ Framework Progress (Green)	☐ Framework Progress (Orange)
☐ Guided Learning Hours	☐ Hours Spent On sessions	☐ Individual course progress (Green)
☐ Individual course progress (Orange)	☐ Key Contact	☐ Last Learner Feedback
☐ Last Learner Feedback Status	☐ Last Review Date	☑ Last Review Status
☑ Last Session Date	☑ Last Session Feedback	☑ Last Session Method
☑ Last Session Planning Notes	☑ Last Session Status	☑ Last Session Type
☐ Learner Status	☑ Learners First Name	☑ Learners Last Name
☐ Manager First Name	☐ Manager Last Name	☐ Next Review Date
☐ Next Session Date	☐ Next Session Type	☐ Number Of Attended Sessions
☐ Number Of Cancelled Session By Assessor	☐ Number Of Cancelled Sessions By Employer	☐ Number Of Cancelled Sessions By Learner
☐ Number Of Unknown Sessions	☐ Partner	☐ Primary Assessor Username
☑ Primary Assessors First Name	☑ Primary Assessors Last Name	☑ Primary Assessors Region
☐ Progress - Time Elapsed %	☑ Second Assessors First Name	☑ Second Assessors Last Name
☐ Stanchion	☐ StudentID	☐ Total Number Of Sessions
☐ Total Number Of Sessions Cancelled	☐ ULN	

11. Click Filters tab, tick the pre fileted options you require within the report.

Columns | **Filters** | OrderBy

☐ 2nd Assessor Full name EQUALS	Susy Watson ▼
☐ 2nd Assessor Name EQUALS	MikeDemo ▼
☐ Assessor Region EQUALS	MikeDemo ▼
☐ Branch Code EQUALS	anndemo ▼
☐ Business Description EQUALS	anndemo ▼
☐ Company/Employer Name EQUALS	Demoemployment ▼
	[ ] **Filter**
☐ Course Name EQUALS	1st4Sport Level 2 Award in Employment Awareness in Active Leisure and Learni ▼
☐ Last Session Cancellation Status EQUALS	attended ▼
☐ Learner Group EQUALS	Uni@work; ▼
☐ Manager Name EQUALS	DemoEmmaEM ▼
☐ Overdue Review EQUALS	1 ▼
☐ Primary Assessors Full name EQUALS	Ann Ramsay ▼
☐ Primary Assessors user name EQUALS	anndemo ▼
☐ Training Status For Course EQUALS	In Training ▼
☐ Course Commence Date	FROM DD/MM/YYYY To DD/MM/YYYY
☐ Course End Date	FROM DD/MM/YYYY To DD/MM/YYYY

12. Click Order By to order the columns to be displayed on the report.

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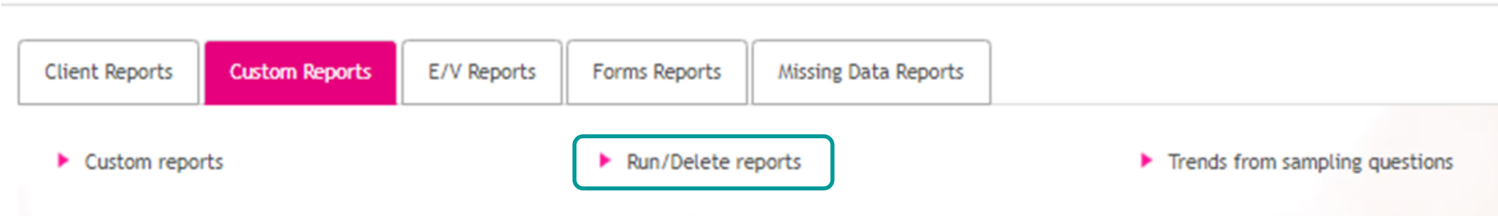
13. Click save when complete.

Run A report

1. Follow steps 1 to 4 as above
2. Select the Run/Delete reports option



3. A list of created reports will display, showing which reports has been shared and an option to delete if required.
4. To run a report, click the report number.

Run/ID	Name	Description	Ownership	Action
Employer Reports				
75	MCT			Delete
Internal Quality Ass Reports				
64	Test Marcus	IQA test	Shared	
62	emma test 1		Shared	
Learner Reports				
57	learner progress		Shared	
13	Learner Report 1	Learner Report 1 Description	Shared	

5. A pop-up message will display, click Ok.

Note *Depending on the size of the report, it may open or export straight to Excel