Reporting Center User Guide

Version 4.8.4.45

LMS365

On-Premises

For Microsoft SharePoint Server

ELEARNINGFORCE

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OVERVIEW

Reporting Center reports display data depending on Reporting Center settings (display only current data or current data with data from the past). See chapter 5.4 in LMS365 On-Premises 4.8 Installation and Configuration Guide for detailed information on how to configure Reporting Center.

Information from the past which is not kept is as follows,

- Curriculums from REM solution;
- Personal Jobs & HR Managers from CCM solution.

Usually information from the modules will be synchronized to the content database configured for Reporting Center after 'ELEARNINGFORCE - Reporting Center: Synchronization Job' completes its work (it runs daily by default). To have all the up-to-date information, please, synchronize your database manually using this timer job.

MAIN FEATURES

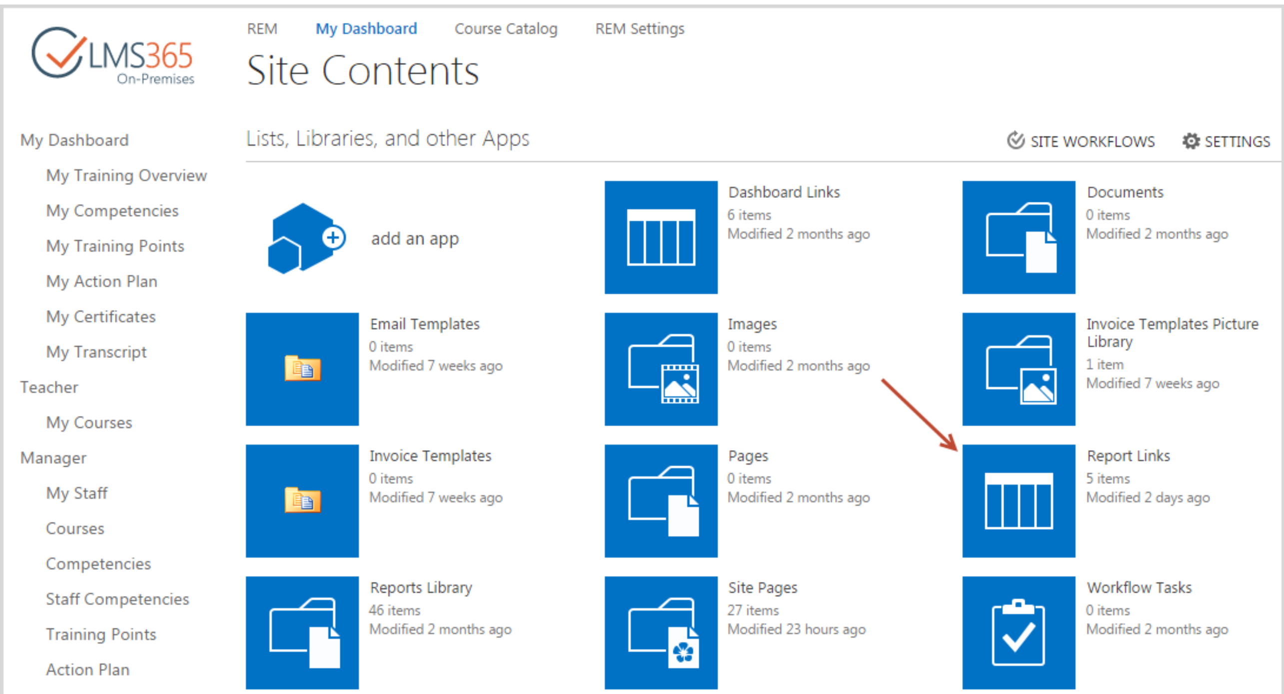
Reporting Center allows creating three types of reports:

- web reports are the simplest way to generate reports and require no additional configuration;
- Excel reports work with the following limitation, - connection works only in case user is logged to client machine and SharePoint from one domain (different domains setup is not supported);
- SQL reports require that you have configured MS SQL Reporting Services in SharePoint Integrated mode (for more information check SharePoint LMS Suite 4.5 Installation and Configuration Guide).

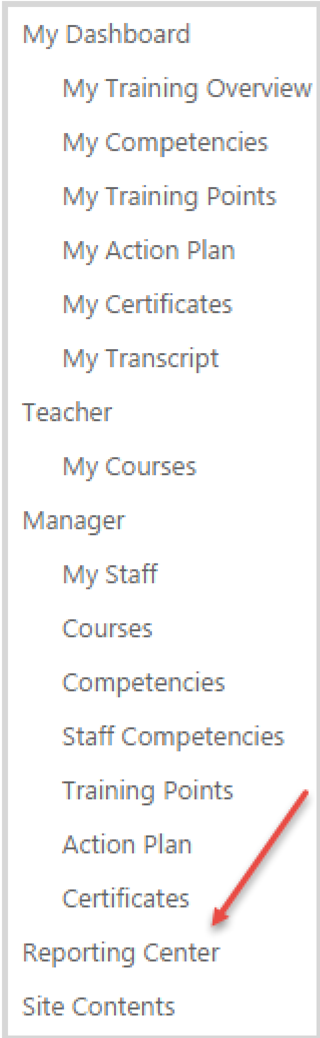
1. Web Reports

To activate web reports feature go to Site settings > Manage Site Features and activate ''ELEARNINGFORCE - Reporting Center: Web Reports" feature. By default, it's activated on Dashboard site:

The feature adds Report Links Library in Site Contents > Report Links. It can be found also at '/SitePages/RC/Report.aspx':



You can access the Reporting Center section by navigating to the respective link in your Dashboard site:



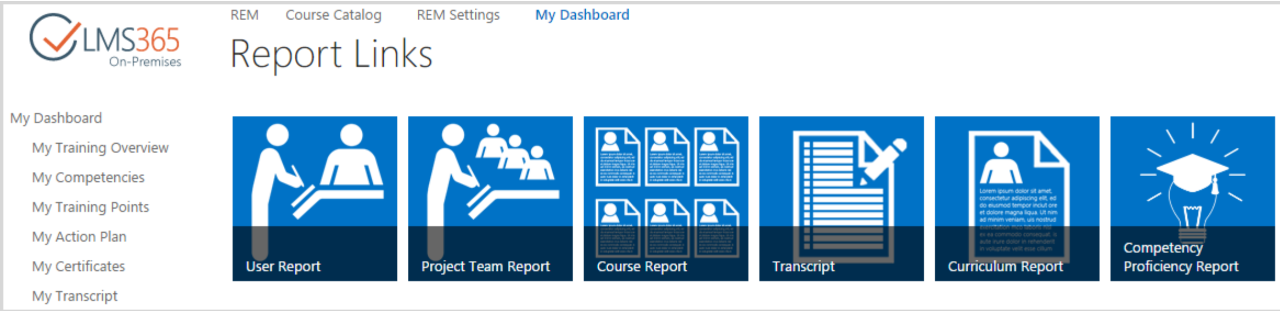
In the table below you can see Roles and Report types that they can correspondingly view:

Role	Report type
Site collection administrator	• User Report (can see himself, his subordinates); • Curriculum Report (can see himself, his subordinates); • Transcript (can see himself, his subordinates); • Project Team Report (can see all Project Teams if he administers CCM host site); • Course Report (can see all users who have CCM Profiles and filter by all courses); • Competency Proficiency Report (can see himself, his subordinates).

LMS Administrator	• User Report (can see himself, his subordinates); • Curriculum Report (can see himself, his subordinates); • Transcript (can see himself, his subordinates); • Project Team Report link is available in REM Settings (can see either all Project Teams if he administers CCM host site or only Project Teams where he is a member); • Course Report link is available in REM Settings (can see all users who have CCM Profiles and filter by all courses); • Competency Proficiency Report (can see himself, his subordinates).
Manager (Line Manager; HR Responsible; Manager from Relationships)	• User Report (can see himself, his subordinates); • Curriculum Report (can see himself, his subordinates); • Transcript (can see himself, his subordinates); • Project Team Report link is available in REM Settings and as a direct link (can see either all Project Teams if he administers CCM host site or only Project Teams where he is a member); • Competency Proficiency Report (can see himself, his subordinates).
Teacher	Sees Reports links after redirecting from DB's Teacher area using Offering Report link: • User Report (can see himself and his subordinates if has any); • Curriculum Report (can see himself and his subordinates if has any); • Transcript (can see himself and his subordinates if has any); • Competency Proficiency Report (can see himself and his subordinates if has any).
Learner	Can see information about himself using direct links in: • User Report; • Curriculum Report; • Transcript; • Competency Proficiency Report.

To create a web report, do the following actions:

1. Go to Report Links page:



2. Select repot type from 6 available types:
   - Project Team Report;
   - Course Report;
   - User Report;
   - Transcript;
   - Curriculum Report;
   - Competency Proficiency Report;
3. Set filters depending on selected report type;
4. Click ‘Generate report’ button to generate report in a web view or ‘Export to Excel’ to initially generate and then save it to your local computer;
5. Additionally you can export generated report to Excel or PDF (only for Transcript report) if necessary.

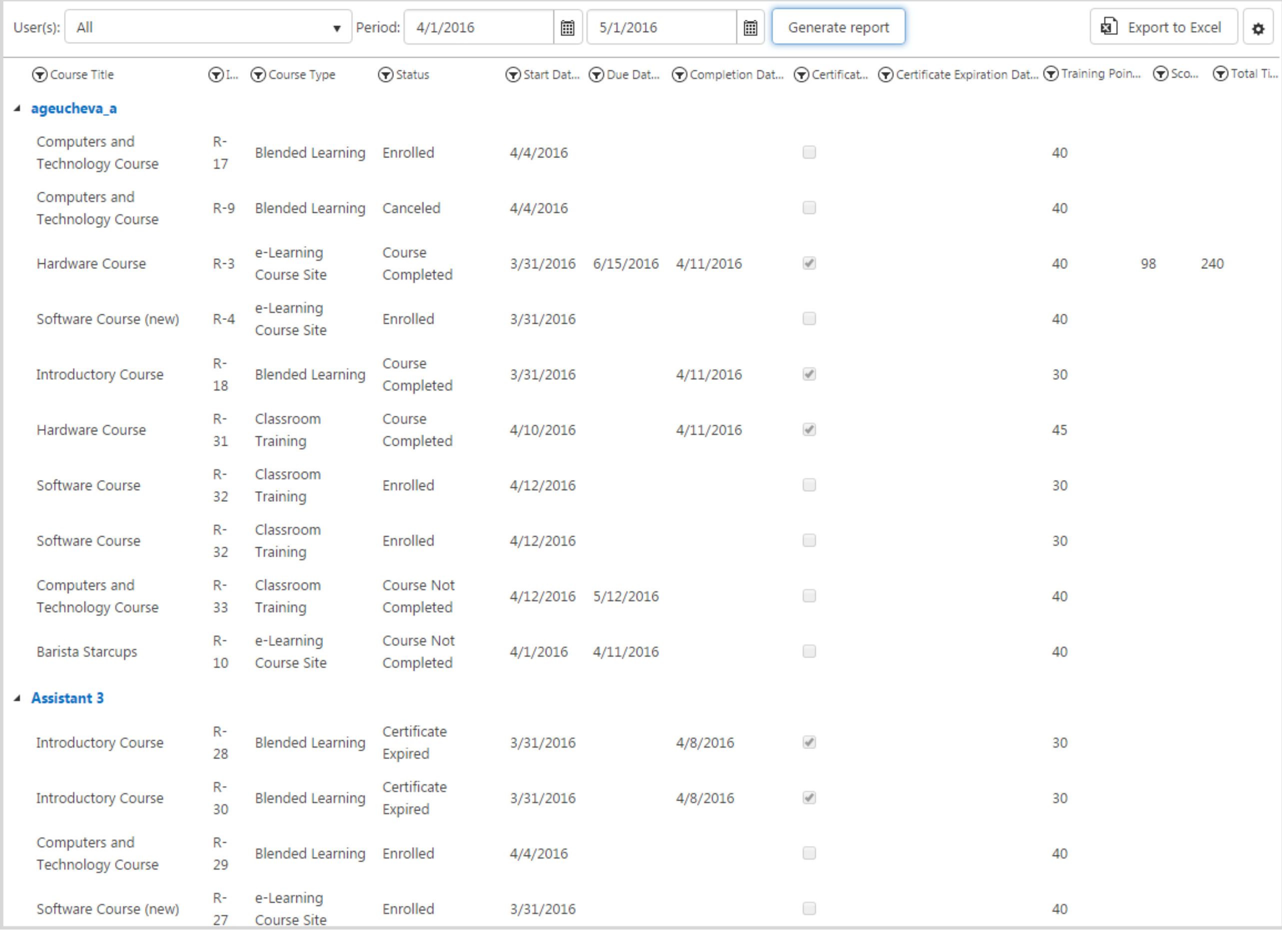
The system allows creating 6 types of web reports with different filters:

1. User Report has 2 available filters:

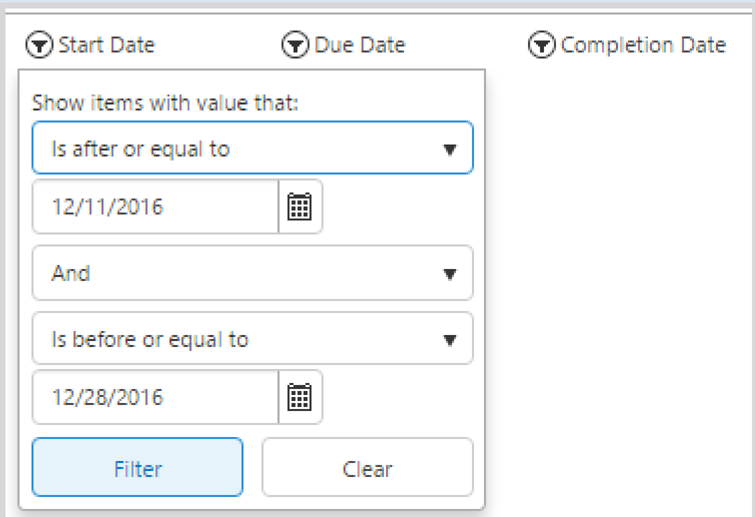
- *User* – a drop-down with subordinates from CCM (those who have the user assigned as manager in the profile field ‘Manager’ and in the ‘Relationships’ list);

NOTE:	If ‘All’ option is selected, the information is grouped by user and can be collapsed by clicking on username. All filters change order of items inside information block about one user, but the order of users is not changed.

- *Period* – two fields for start date & end date. All registrations with the enrollment date falling under the selected period will be displayed in the report. Enrollment date is the date when registration status became 'Enrolled', e.g. when learner enrolls in a course offering with Access Start Date in future, he will have registration with ‘Wait For Start Date’ status and it will be changed to ‘Enrolled’ when start date comes, and this date will be considered as enrollment date:



Course Title	I...	Course Type	Status	Start Dat...	Due Dat...	Completion Dat...	Certificat...	Certificate Expiration Dat...	Training Poin...	Sco...	Total Ti...
ageucheva_a											
Computers and Technology Course	R-17	Blended Learning	Enrolled	4/4/2016					40		
Computers and Technology Course	R-9	Blended Learning	Canceled	4/4/2016					40		
Hardware Course	R-3	e-Learning Course Site	Course Completed	3/31/2016	6/15/2016	4/11/2016	✓		40	98	240
Software Course (new)	R-4	e-Learning Course Site	Enrolled	3/31/2016					40		
Introductory Course	R-18	Blended Learning	Course Completed	3/31/2016		4/11/2016	✓		30		
Hardware Course	R-31	Classroom Training	Course Completed	4/10/2016		4/11/2016	✓		45		
Software Course	R-32	Classroom Training	Enrolled	4/12/2016					30		
Software Course	R-32	Classroom Training	Enrolled	4/12/2016					30		
Computers and Technology Course	R-33	Classroom Training	Course Not Completed	4/12/2016	5/12/2016				40		
Barista Starcups	R-10	e-Learning Course Site	Course Not Completed	4/1/2016	4/11/2016				40		
Assistant 3											
Introductory Course	R-28	Blended Learning	Certificate Expired	3/31/2016		4/8/2016	✓		30		
Introductory Course	R-30	Blended Learning	Certificate Expired	3/31/2016		4/8/2016	✓		30		
Computers and Technology Course	R-29	Blended Learning	Enrolled	4/4/2016					40		
Software Course (new)	R-27	e-Learning Course Site	Enrolled	3/31/2016					40		

NOTE:	For more convenient search by dates, we recommend using Start Date, Due Date, and Completion Date columns' filters when report is generated:  Use Calendar icon to set date and then click Filter button to filter the information presented in the report.

The following information is displayed in the User Report:

Course Title– contains course name;

ID – contains user registration ID to SharePoint REM course;

Course Type – contains type of SharePoint REM course;

Status – contains status of user registration to SharePoint REM course;

Start Date – contains registration enrollment date (when user enrolls after course offering start date has come) or Course Offering Access Start Date (when user enrolls before course offering start date has come) or registration creation date (when there is no enrollment date);

Due Date – contains Due Date which is displayed depending on Registration status. If Registration status is 'Enrolled' or 'Not Completed', Due Date displays the Due Date of Course Offering (if 'Dynamic Due Date' option is enabled on the Enrollment Template) or Access End Date of Course Offering. If Registration status is 'Completed', Due Date displays Registration completion date;

Completion Date – contains course completion date (for completed registrations);

Certificate – contains a mark next to courses for which user received a certificate;

Certificate Expiration Date – shows date of certificate expiration (if certificate expires);

Training Points – shows number of training points assigned for the course;

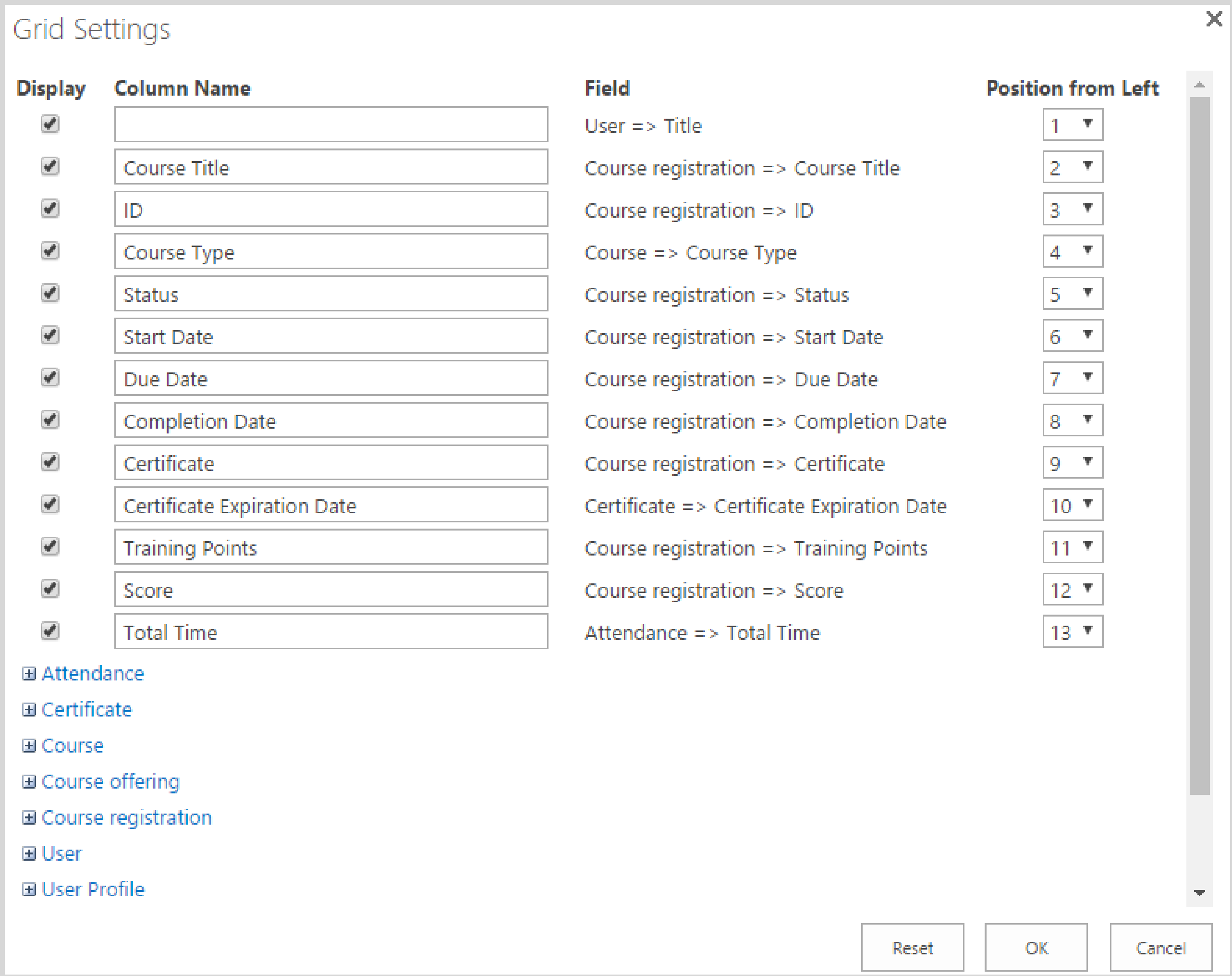
Score – shows user's score (in percentage terms) for the course, information is taken from SharePoint Dashboard (for e-learning and blended courses only). For e-learning content package courses points got for SCORM completion are displayed in this column;

NOTE:	For e-learning and blended courses, Score is displayed according to the Gradebook settings. For e-learning content package courses, Score is displayed as Points got for the last user's attempt. If completion of multiple SCORMs is required for course completion, an average of last attempts of these SCORMs is displayed in Score column. Score value is displayed when Course registration status is changed to 'Course Completed' as well as for the registrations with 'Course Not Completed' status.

Total Time – shows user's total time for the course, information is taken from SharePoint Dashboard Attendance section (for e-learning, blended and classroom training courses).

It is possible to change the view of the information presented in the generated report. To do this, click settings button next to Export to Excel button:

In the open form you can select which columns to show/hide (Display column), change title of any column (Column Name column), set order of columns (Position from Left column), group information by necessary properties (select from the drop-down), and add any column from Course, Course offering, and Course registration lists categories (expand necessary category and select columns to add). Other columns (Certificate, User, UserProfile categories) are managed by the system:



NOTE:	You can add custom columns to Courses, Course Offerings, Registrations lists (via List Settings on lists pages), and then check them in Grid Settings to add to the report.
NOTE:	The following types of columns are supported: Managed Metadata, Number, String, and Date.

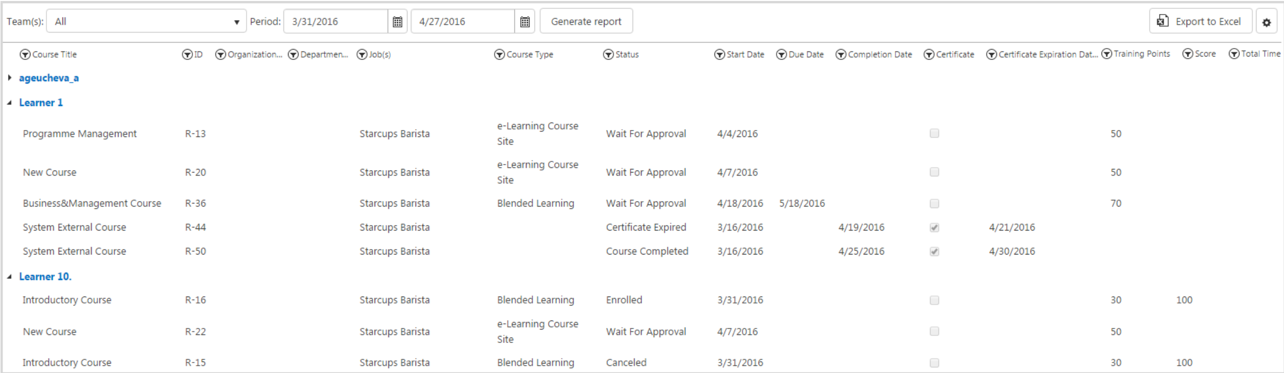
Click OK button to apply the changes or Cancel button to discard them.

NOTE:	Specified grid settings will be set for all users.

2. Project Team Report has 2 available filters:
   - *Team* – a drop-down with a list of teams in which user or his subordinates is team member/team leader;

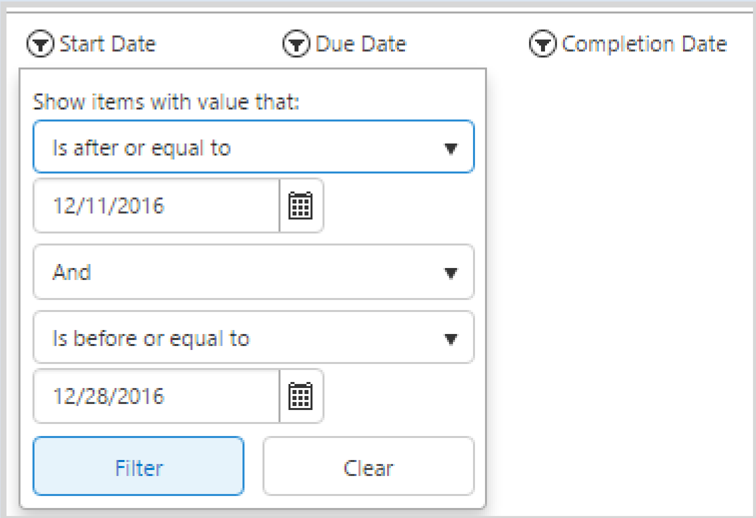
NOTE:	Project Team with AD group specified as Team Member can also be viewed in Project Team Report by Team Leader.

   - *Period* – two fields for start date & end date. All registrations with the enrollment date falling under the selected period will be displayed in the report. Enrollment date is the date when registration status became 'Enrolled', e.g. when learner enrolls in a course offering with Access Start Date in future, he will have registration with ‘Wait For Start Date’ status and it will be changed to ‘Enrolled’ when start date comes, and this date will be considered as enrollment date:



Team(s): All | Period: 3/31/2016 – 4/27/2016 | Generate report | Export to Excel

Course Title	ID	Organization...	Departmen...	Job(s)	Course Type	Status	Start Date	Due Date	Completion Date	Certificate	Certificate Expiration Dat...	Training Points	Score	Total Time
ageucheva_a														
Learner 1														
Programme Management	R-13			Starcups Barista	e-Learning Course Site	Wait For Approval	4/4/2016			☐		50		
New Course	R-20			Starcups Barista	e-Learning Course Site	Wait For Approval	4/7/2016			☐		50		
Business&Management Course	R-36			Starcups Barista	Blended Learning	Wait For Approval	4/18/2016	5/18/2016		☐		70		
System External Course	R-44			Starcups Barista		Certificate Expired	3/16/2016		4/19/2016	☑	4/21/2016			
System External Course	R-50			Starcups Barista		Course Completed	3/16/2016		4/25/2016	☑	4/30/2016			
Learner 10.														
Introductory Course	R-16			Starcups Barista	Blended Learning	Enrolled	3/31/2016			☐		30	100	
New Course	R-22			Starcups Barista	e-Learning Course Site	Wait For Approval	4/7/2016			☐		50		
Introductory Course	R-15			Starcups Barista	Blended Learning	Canceled	3/31/2016			☐		30	100	

NOTE:	For more convenient search by dates, we recommend using Start Date, Due Date, and Completion Date columns' filters when report is generated:  Use Calendar icon to set date and then click Filter button to filter the information presented in the report.

The following information is displayed in the Project Team Report:

Course Title– contains course name;

ID – contains user registration ID to SharePoint REM course;

Organization – shows user's organization;

Department – shows user's department from SharePoint CCM profile;

Job(s) – shows user's jobs from SharePoint CCM profile;

Course Type – contains type of SharePoint REM course;

Status – contains status of user registration to SharePoint REM course;

Start Date – contains registration enrollment date (when user enrolls after course offering start date has come) or Course Offering Access Start Date (when user enrolls before course offering start date has come) or registration creation date (when there is no enrollment date);

Due Date – contains Due Date which is displayed depending on Registration status. If Registration status is 'Enrolled' or 'Not Completed', Due Date displays the Due Date of Course Offering (if 'Dynamic Due Date' option is enabled on the Enrollment Template) or Access End

Date of Course Offering. If Registration status is 'Completed', Due Date displays Registration completion date;

Completion Date – contains course completion date (for completed registrations);

Certificate – contains a mark next to courses for which user received a certificate;

Certificate Expiration Date – shows date of certificate expiration (if certificate expires);

Training Points – shows number of training points assigned for the course;

Score – shows user's score (in percentage terms) for the course, information is taken from SharePoint Dashboard (for e-learning and blended courses only). For e-learning content package courses points got for SCORM completion are displayed in this column;

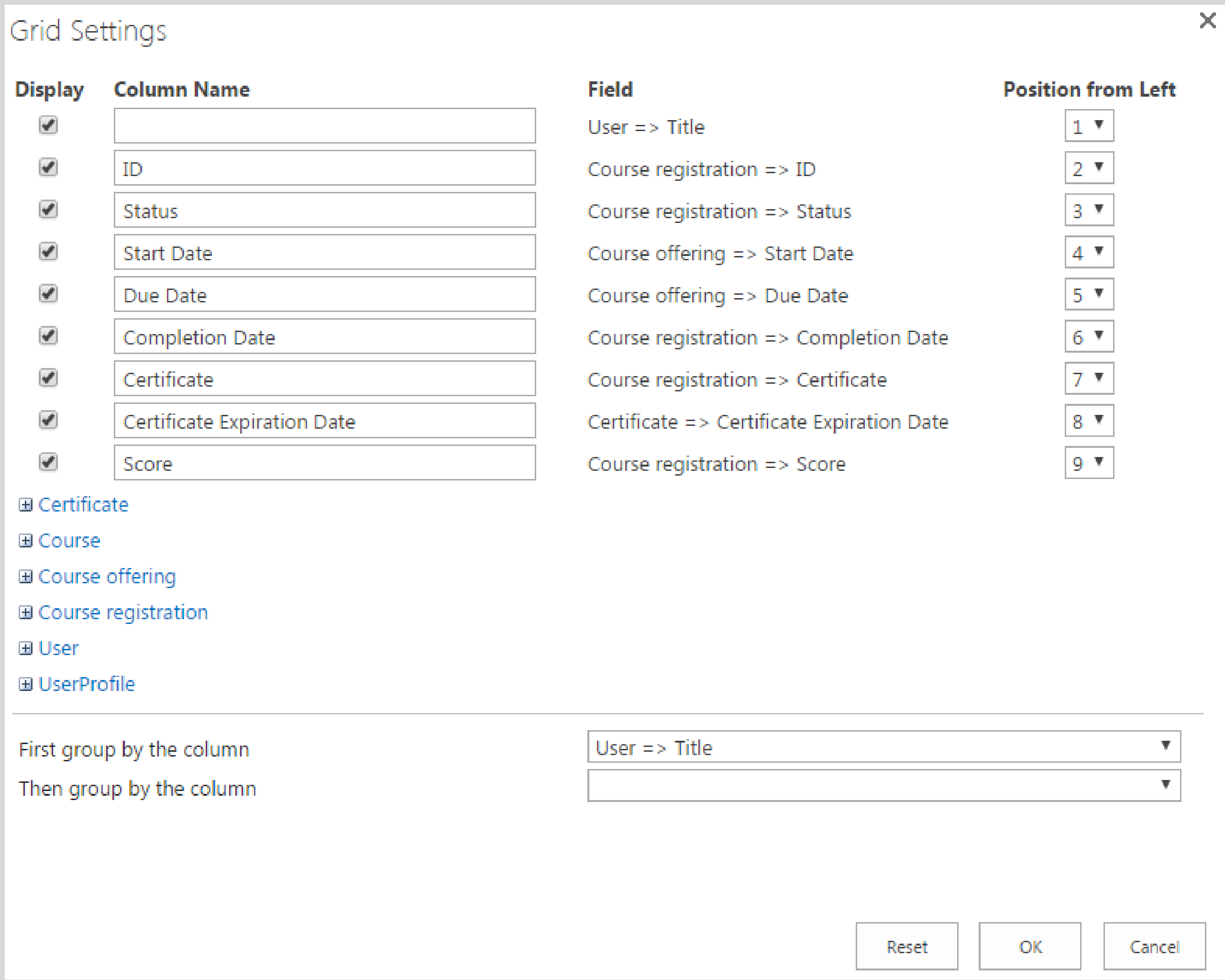
NOTE:	For e-learning and blended courses, Score is displayed according to the Gradebook settings. For e-learning content package courses, Score is displayed as Points got for the last user's attempt. If completion of multiple SCORMs is required for course completion, an average of last attempts of these SCORMs is displayed in Score column. Score value is displayed when Course registration status is changed to 'Course Completed' as well as for the registrations with 'Course Not Completed' status.

Total Time – shows user's total time for the course, information is taken from SharePoint Dashboard Attendance section (for e-learning, blended and classroom training courses).

NOTE:	Information in the report is grouped by user and can be collapsed by clicking on username. All filters change order of items inside information block about one user, but the order of users is not changed.

It is possible to change the view of the information presented in the generated report. To do this, click settings button next to Export to Excel button:

In the open form you can select which columns to show/hide (Display column), change title of any column (Column Name column), set order of columns (Position from Left column), group information by necessary properties (select from the drop-down), and add any column from Course, Course offering, and Course registration lists categories (expand necessary category and select columns to add). Other columns (Certificate, User, UserProfile categories) are managed by the system:

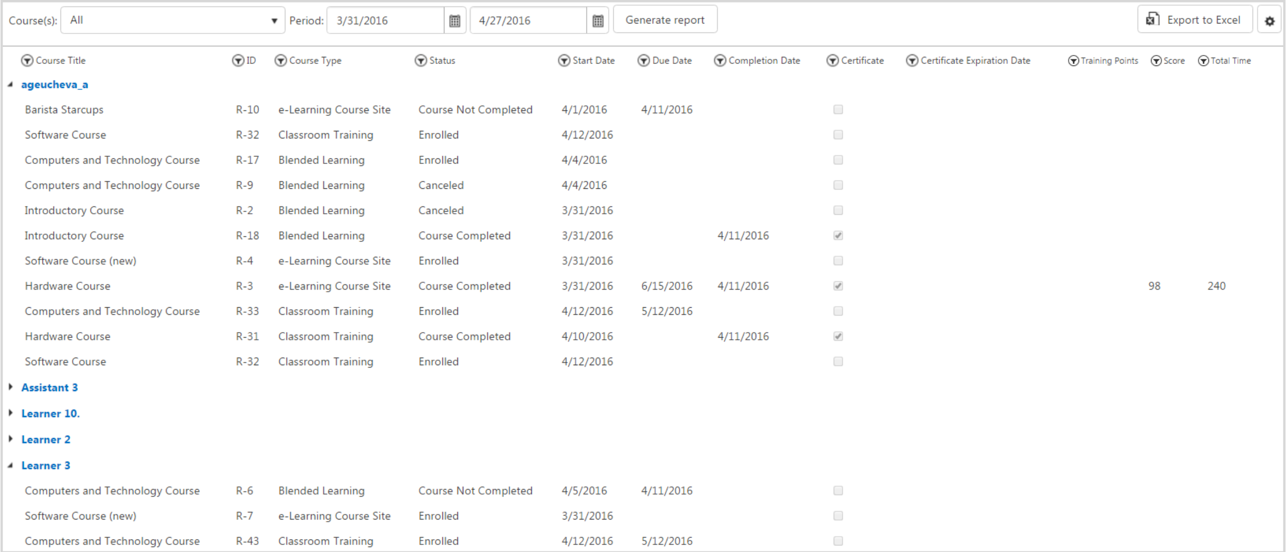


NOTE:	You can add custom columns to specified lists (via List Settings on lists pages), and then check them in Grid Settings to add to the report.
NOTE:	The following types of columns are supported: Managed Metadata, Number, String, and Date.

Click OK button to apply the changes or Cancel button to discard them.

NOTE:	Specified grid settings will be set for all users.

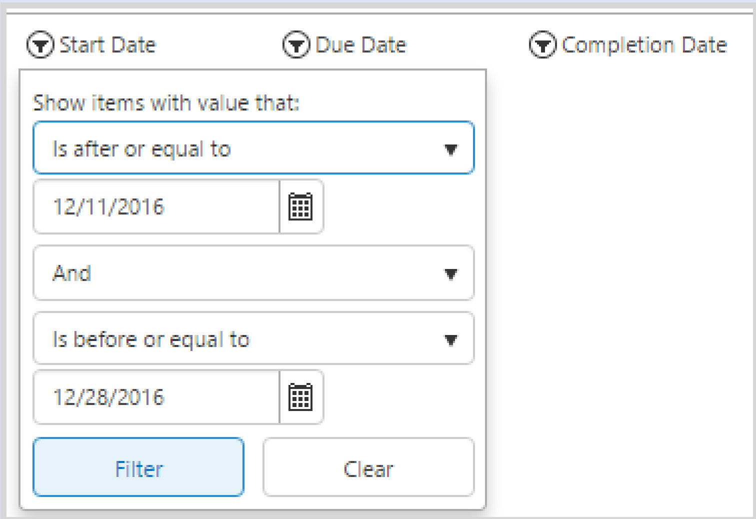
3. Course Report has 3 available filters:
    - *Course* – a drop-down with list of courses where the user has Teacher role;
    - *Offering(s)* – a drop-down with list of offerings for the selected course (several or all offerings can be selected);
    - *Period* – two fields for start date & end date. All registrations with the enrollment date falling under the selected period will be displayed in the report. Enrollment date is the date when registration status became 'Enrolled', e.g. when learner enrolls in a course offering with Access Start Date in future, he will have registration with 'Wait For Start Date' status and it will be changed to 'Enrolled' when start date comes, and this date will be considered as enrollment date:



Course(s): All | Period: 3/31/2016 | 4/27/2016 | Generate report | Export to Excel

Course Title	ID	Course Type	Status	Start Date	Due Date	Completion Date	Certificate	Certificate Expiration Date	Training Points	Score	Total Time
ageucheva_a											
Barista Starcups	R-10	e-Learning Course Site	Course Not Completed	4/1/2016	4/11/2016		☐				
Software Course	R-32	Classroom Training	Enrolled	4/12/2016			☐				
Computers and Technology Course	R-17	Blended Learning	Enrolled	4/4/2016			☐				
Computers and Technology Course	R-9	Blended Learning	Canceled	4/4/2016			☐				
Introductory Course	R-2	Blended Learning	Canceled	3/31/2016			☐				
Introductory Course	R-18	Blended Learning	Course Completed	3/31/2016		4/11/2016	☑				
Software Course (new)	R-4	e-Learning Course Site	Enrolled	3/31/2016			☐				
Hardware Course	R-3	e-Learning Course Site	Course Completed	3/31/2016	6/15/2016	4/11/2016	☑			98	240
Computers and Technology Course	R-33	Classroom Training	Enrolled	4/12/2016	5/12/2016		☐				
Hardware Course	R-31	Classroom Training	Course Completed	4/10/2016		4/11/2016	☑				
Software Course	R-32	Classroom Training	Enrolled	4/12/2016			☐				
Assistant 3											
Learner 10.											
Learner 2											
Learner 3											
Computers and Technology Course	R-6	Blended Learning	Course Not Completed	4/5/2016	4/11/2016		☐				
Software Course (new)	R-7	e-Learning Course Site	Enrolled	3/31/2016			☐				
Computers and Technology Course	R-43	Classroom Training	Enrolled	4/12/2016	5/12/2016		☐				

NOTE: For more convenient search by dates, we recommend using Start Date, Due Date, and Completion Date columns' filters when report is generated:



Use Calendar icon to set date and then click Filter button to filter the information presented in the report.

The following information is displayed in the Course Report:

Course Title– contains course name;

ID – contains user registration ID to SharePoint REM course;

Course Type – contains type of SharePoint REM course;

Status – contains status of user registration to SharePoint REM course;

Start Date – contains registration enrollment date (when user enrolls after course offering start date has come) or Course Offering Access Start Date (when user enrolls before course offering start date has come) or registration creation date (when there is no enrollment date);

Due Date – contains Due Date which is displayed depending on Registration status. If Registration status is 'Enrolled' or 'Not Completed', Due Date displays the Due Date of Course Offering (if 'Dynamic Due Date' option is enabled on the Enrollment Template) or Access End

Date of Course Offering. If Registration status is 'Completed', Due Date displays Registration completion date;

Completion Date – contains course completion date (for completed registrations);

Certificate – contains a mark next to courses for which user received a certificate;

Certificate Expiration Date – shows date of certificate expiration (if certificate expires);

Training Points – shows number of training points assigned for the course;

Score – shows user's score (in percentage terms) for the course, information is taken from SharePoint Dashboard (for e-learning and blended courses only). For e-learning content package courses points got for SCORM completion are displayed in this column;

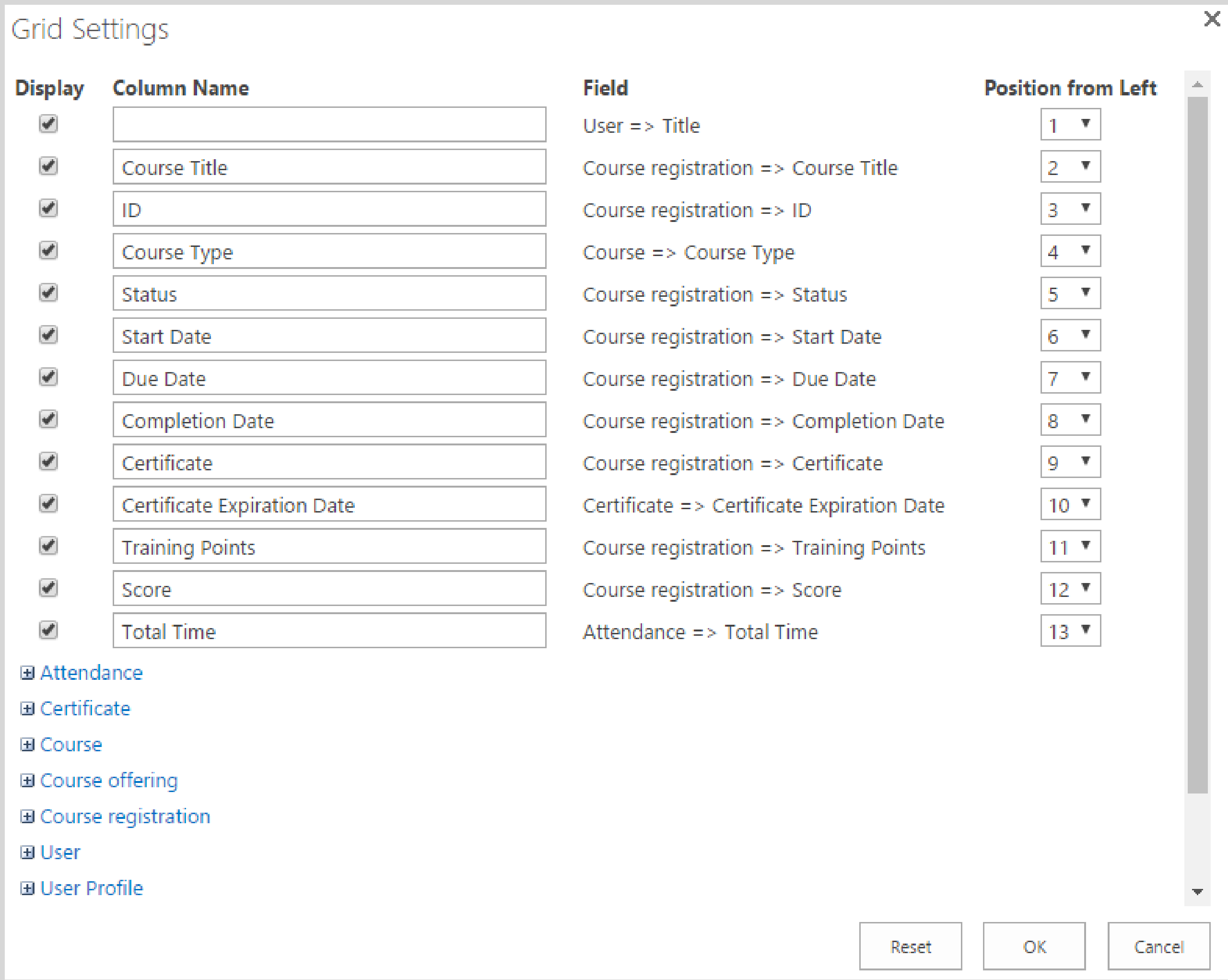
NOTE:	For e-learning and blended courses, Score is displayed according to the Gradebook settings. For e-learning content package courses, Score is displayed as Points got for the last user's attempt. If completion of multiple SCORMs is required for course completion, an average of last attempts of these SCORMs is displayed in Score column. Score value is displayed when Course registration status is changed to 'Course Completed' as well as for the registrations with 'Course Not Completed' status.

Total Time – shows user's total time for the course, information is taken from SharePoint Dashboard Attendance section (for e-learning, blended and classroom training courses).

NOTE:	Information in the report is grouped by user and can be collapsed by clicking on username. All filters change order of items inside information block about one user, but the order of users is not changed.

It is possible to change the view of the information presented in the generated report. To do this, click settings button next to Export to Excel button:

In the open form you can select which columns to show/hide (Display column), change title of any column (Column Name column), set order of columns (Position from Left column), group information by necessary properties (select from the drop-down), and add any column from Course, Course offering, and Course registration lists categories (expand necessary category and select columns to add). Other columns (Certificate, User, UserProfile categories) are managed by the system:

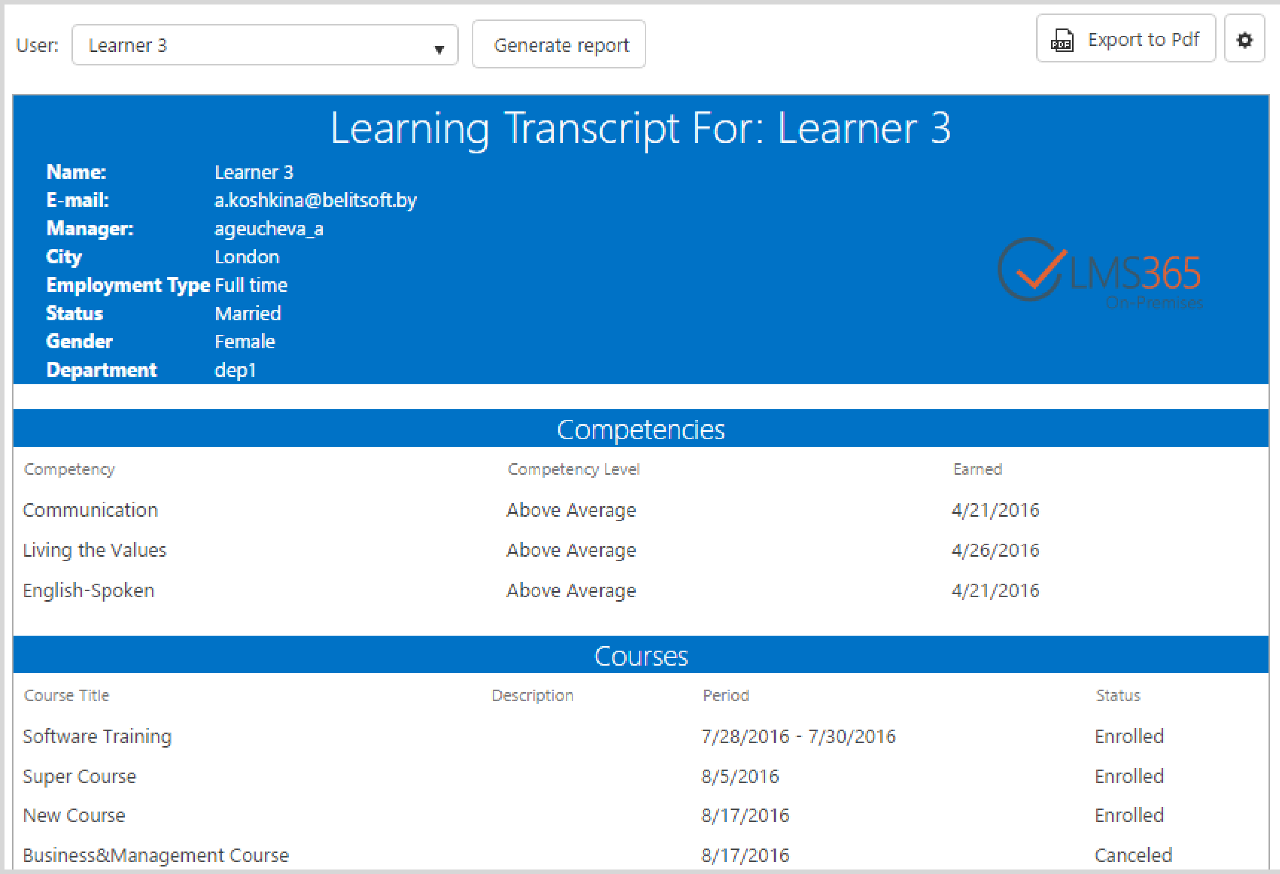


NOTE:	You can add custom columns to specified lists (via List Settings on lists pages), and then check them in Grid Settings to add to the report.
NOTE:	The following types of columns are supported: Managed Metadata, Number, String, and Date.

Click OK button to apply the changes or Cancel button to discard them.

NOTE:	Specified grid settings will be set for all users.

4. Transcript has a single filter:
   - *User* – a drop-down list with subordinates from CCM (those who have the user assigned as manager in the profile field ‘Manager’ or in Relationships section). Only one user at a time can be selected:



User: Learner 3 | Generate report | Export to Pdf

Learning Transcript For: Learner 3

Name:	Learner 3
E-mail:	a.koshkina@belitsoft.by
Manager:	ageucheva_a
City	London
Employment Type	Full time
Status	Married
Gender	Female
Department	dep1

Competencies

Competency	Competency Level	Earned
Communication	Above Average	4/21/2016
Living the Values	Above Average	4/26/2016
English-Spoken	Above Average	4/21/2016

Courses

Course Title	Description	Period	Status
Software Training		7/28/2016 - 7/30/2016	Enrolled
Super Course		8/5/2016	Enrolled
New Course		8/17/2016	Enrolled
Business&Management Course		8/17/2016	Canceled

The following information is displayed in the Transcript:

Competencies – list of user's competencies with the indication of level and date it was modified;

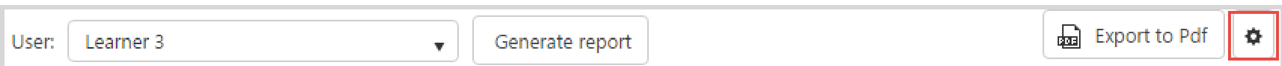
Courses – list of courses where user has Learner role with description and Start and End dates (Period tab). Start Date displays Registration Enrollment Date. End Date is displayed depending on Registration status. If Registration status is 'Enrolled' or 'Not Completed', End Date displays the Due Date of Course Offering (if 'Dynamic Due Date' option is enabled on the Enrollment Template) or Access End Date of Course Offering. If Registration status is 'Completed', End Date displays Registration completion date;

Certificates – list of user's certificates with their status and dates of issue and expiration;

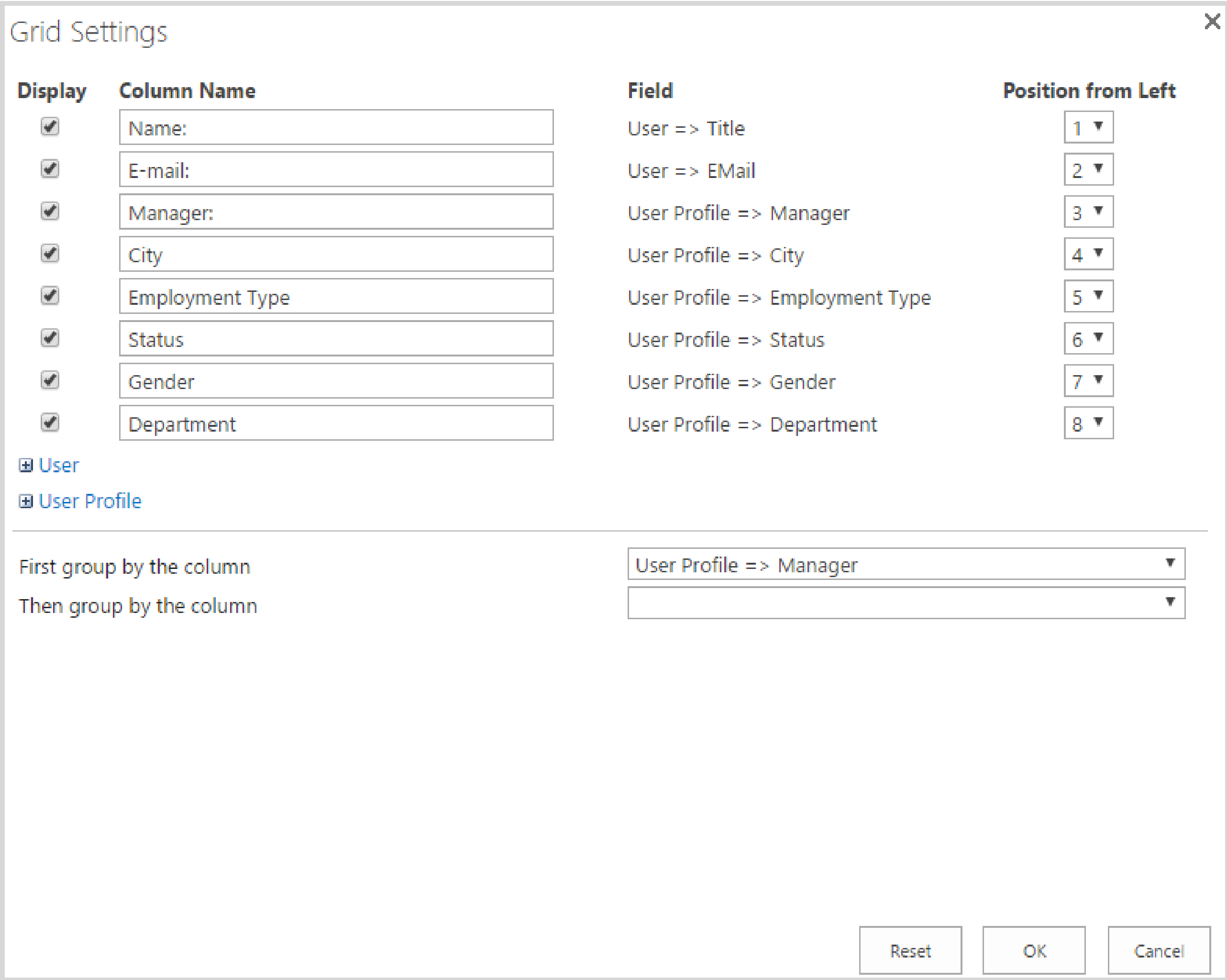
Teams – list of user's teams and user's role in these teams;

Training Points – list of courses for which the user has gained or will gain training points, date when training points were acquired (for completed courses) and the number of points (for each course and total).

It is possible to add information from user's CCM profile to the generated Transcript. To do this, click settings button next to Export to Excel button:



In the open form you can select which information to show/hide (Display column), change title of any field (Column Name column), set order of fields (Position from Left column), group information by necessary properties (select from the drop-down), and add any column from CCM Personal Profiles (UserProfile category). User category is managed by the system:



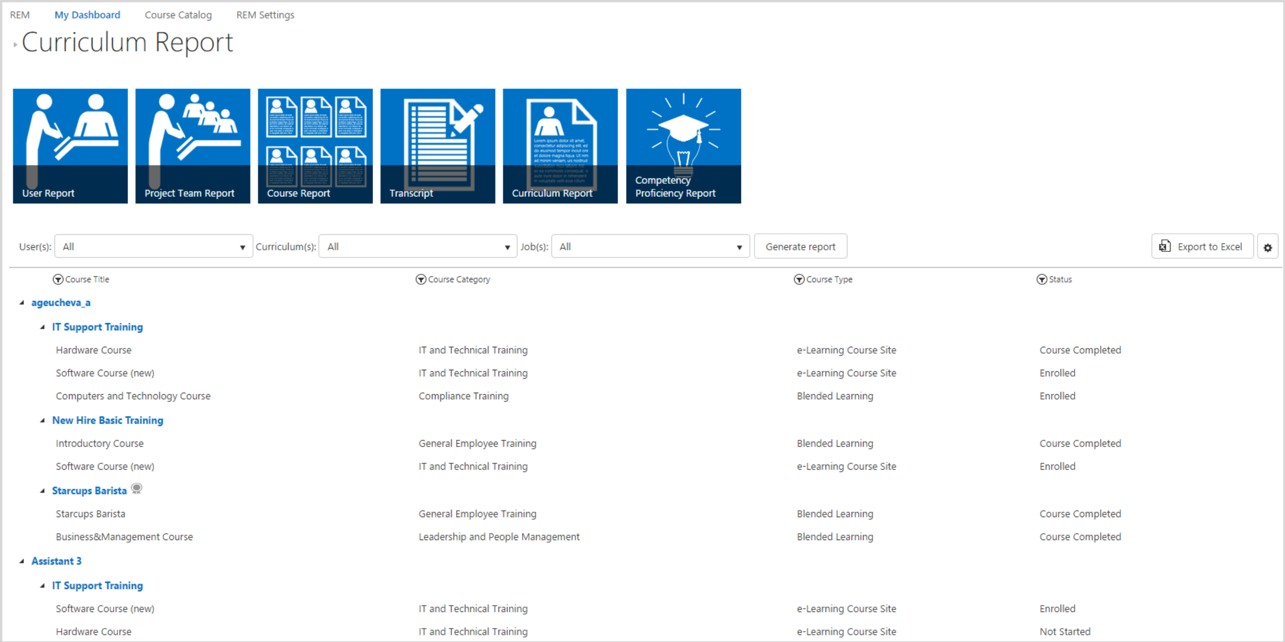
NOTE:	The following types of columns are supported: Managed Metadata, Number, String, and Date.

Click OK button to apply the changes or Cancel button to discard them.

NOTE:	Specified grid settings will be set for all users.

5. Curriculum Report has 3 available filters:
   - *User* – a drop-down list with subordinates from CCM (those who have the user assigned as manager in the profile field 'Manager' or in Relationships section);
   - *Curriculum* – a drop-down with a list of all curriculums (several or all curriculums can be selected);
   - *Job* – a drop-down with a list of all jobs (several or all jobs can be selected).

NOTE:	All existing jobs and curriculums are shown in drop-downs. When you select a user, items are filtered in the following way: • curriculums that are assigned to user are checked by default • jobs that are related to curriculums are checked by default



The following information is displayed in the Curriculum Report:

Course Title– contains course name;

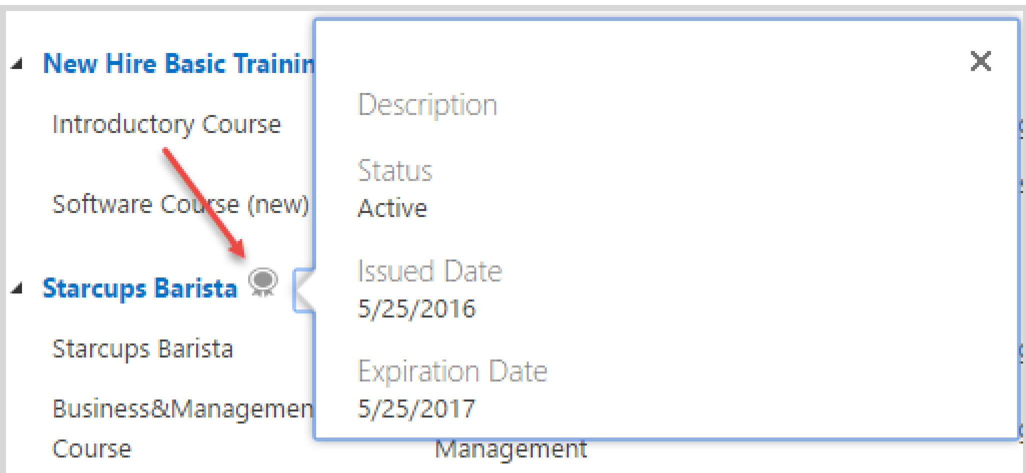
Course Category – shows category of SharePoint REM course;

Course Type – contains type of SharePoint REM course;

Status – contains status of user registration to SharePoint REM course;

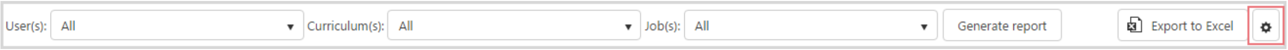
NOTE:	Information in the report is grouped by user and then by curriculum and can be collapsed by clicking on username or curriculum title. All filters change order of items inside information block about one user/one curriculum, but the order of users and curriculums is not changed.

Curriculum with the issued certificate has Certificate icon next to its name. Click on this icon to open callout menu. Information about Curriculum Certificate status (Active/Expired), Curriculum Certificate Issued Date, and Curriculum Certificate Expiration Date will appear:

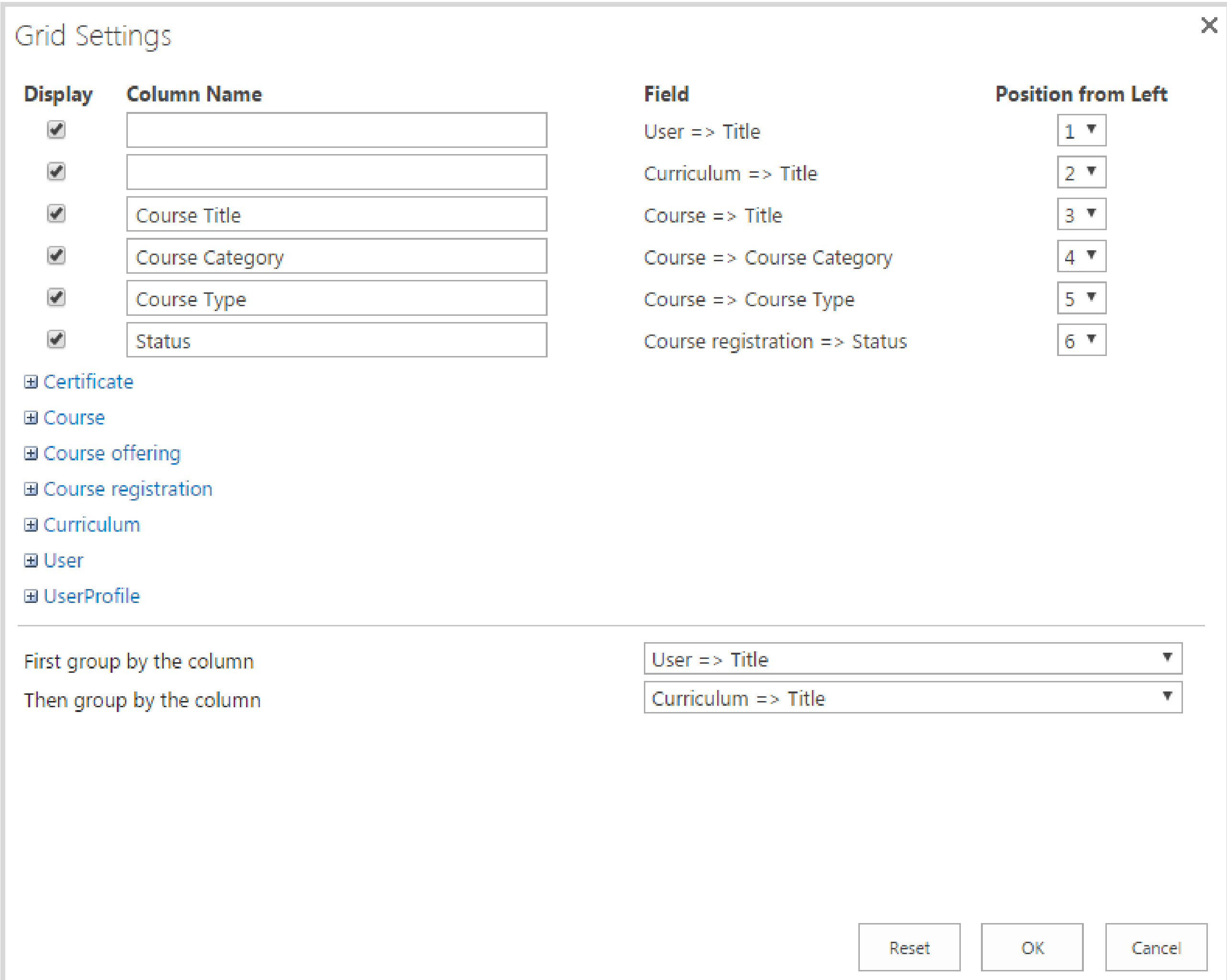


NOTE:	Certificate icon appears only for curriculums with 'Completed' status.

It is possible to change the view of the information presented in the generated report. To do this, click settings button next to Export to Excel button:



In the open form you can select which columns to show/hide (Display column), change title of any column (Column Name column), set order of columns (Position from Left column), group information by necessary properties (select from the drop-down), and add any column from Course, Course offering, and Course registration lists categories (expand necessary category and select columns to add). Other columns (Certificate, Curriculum, User, UserProfile categories) are managed by the system:



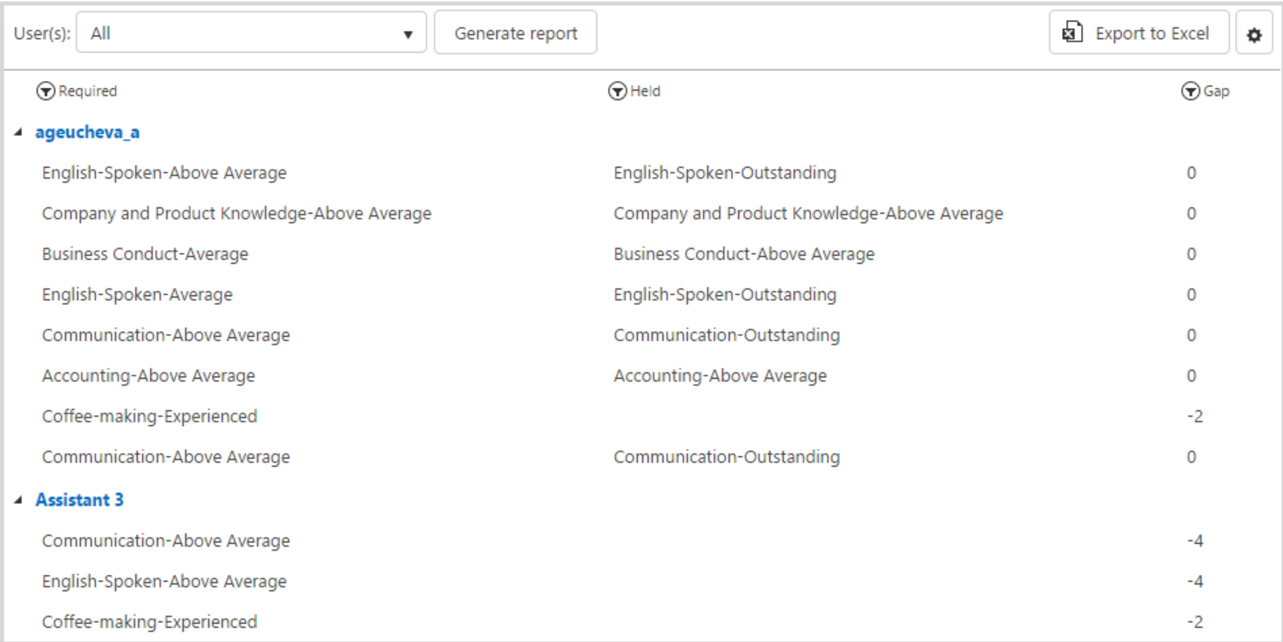
NOTE:	You can add custom columns to specified lists (via List Settings on lists pages), and then check them in Grid Settings to add to the report.
NOTE:	The following types of columns are supported: Managed Metadata, Number, String, and Date.

Click OK button to apply the changes or Cancel button to discard them.

NOTE:	Specified grid settings will be set for all users.

6. Competency Proficiency Report has a single filter:
   - *User*(s) – a drop-down list with subordinates from CCM (those who have the user assigned as manager in the profile field 'Manager' or in Relationships section).

Click Generate report button to generate a report. The following information will appear:



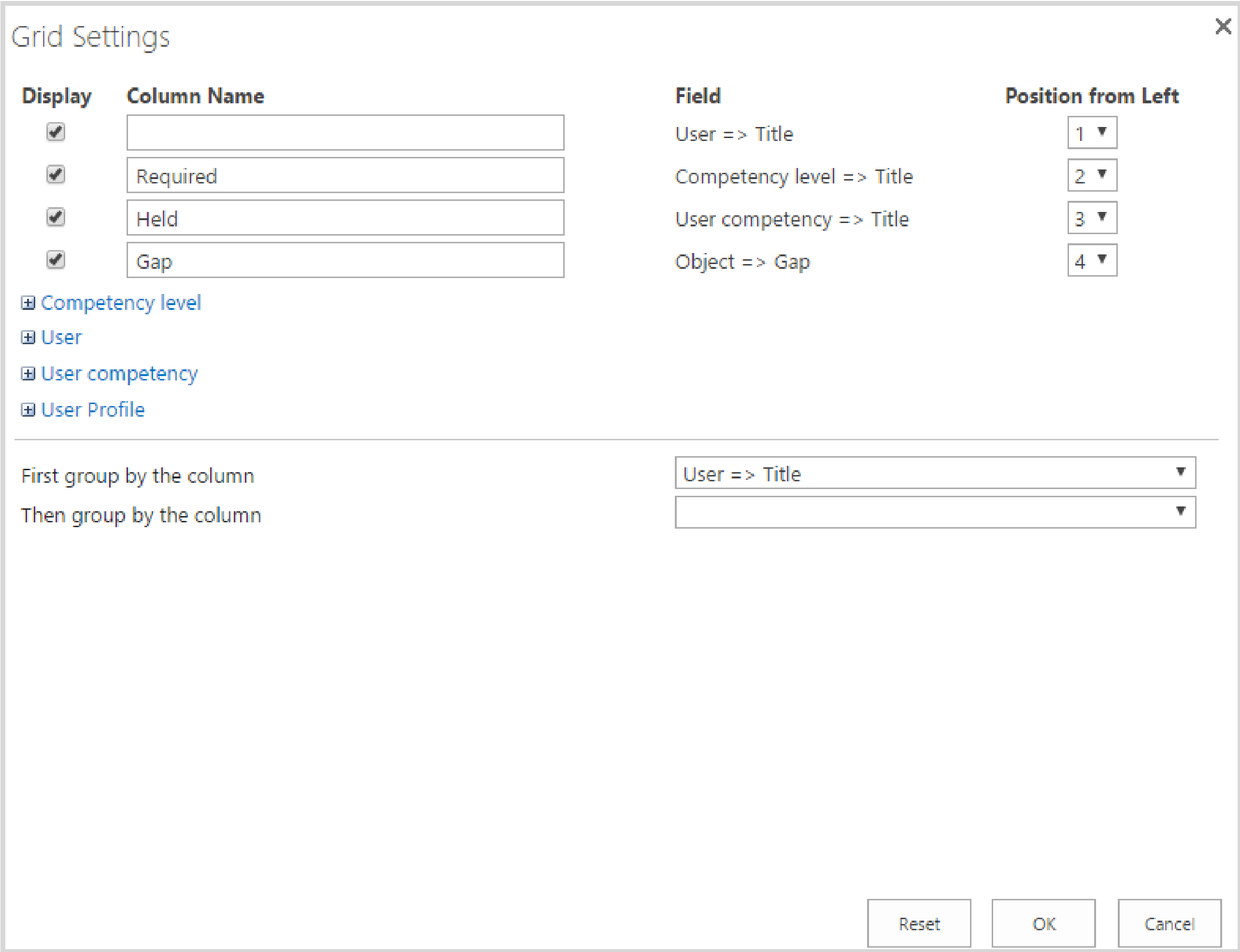
Required	Held	Gap
ageucheva_a		
English-Spoken-Above Average	English-Spoken-Outstanding	0
Company and Product Knowledge-Above Average	Company and Product Knowledge-Above Average	0
Business Conduct-Average	Business Conduct-Above Average	0
English-Spoken-Average	English-Spoken-Outstanding	0
Communication-Above Average	Communication-Outstanding	0
Accounting-Above Average	Accounting-Above Average	0
Coffee-making-Experienced		-2
Communication-Above Average	Communication-Outstanding	0
Assistant 3		
Communication-Above Average		-4
English-Spoken-Above Average		-4
Coffee-making-Experienced		-2

Required – list of competencies with the indication of the required level;
Held – list of competencies with the indication of the held level;
Gap – the difference between the held and suggested levels of Competency.

NOTE:	Information in the report is grouped by user and can be collapsed by clicking on username. All filters change order of items inside information block about one user, but the order of users is not changed.

It is possible to change the view of the information presented in the generated report. To do this, click settings button next to Export to Excel button:

In the open form you can select which columns to show/hide (Display column), change title of any column (Column Name column), set order of columns (Position from Left column), group information by necessary properties (select from the drop-down), and add any column from CCM Personal Profiles (UserProfile category) and Competencies list (Competency level and User competency categories)(expand necessary category and select columns to add). Other columns (User category) are managed by the system:



NOTE:	You can add custom columns to specified lists (via List Settings on lists pages), and then check them in Grid Settings to add to the report.
NOTE:	The following types of columns are supported: string, number, and date.

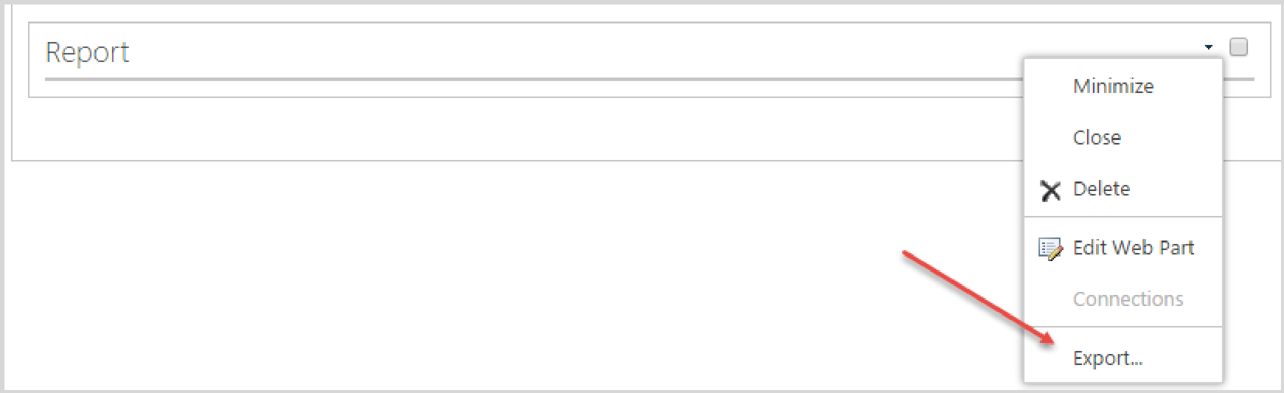
Click OK button to apply the changes or Cancel button to discard them.

NOTE:	Specified grid settings will be set for all users.

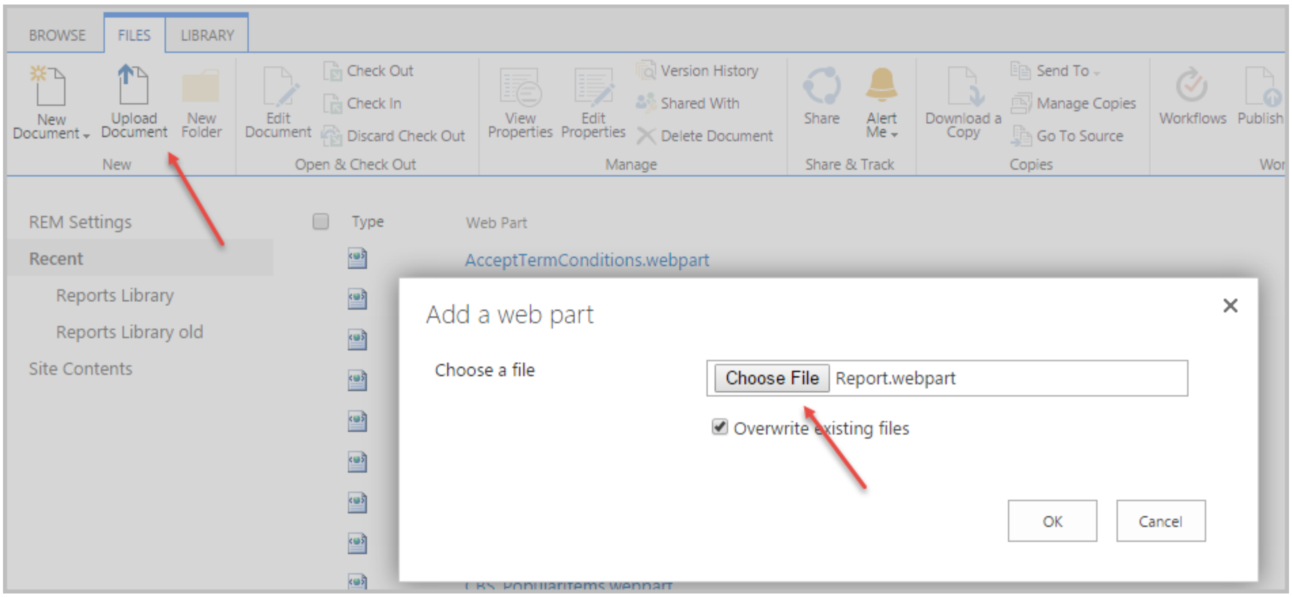
1.1 Adding custom Web Report

To add custom web report, you need to add Report web part to the necessary page, and then customize it. To do this, do the following:

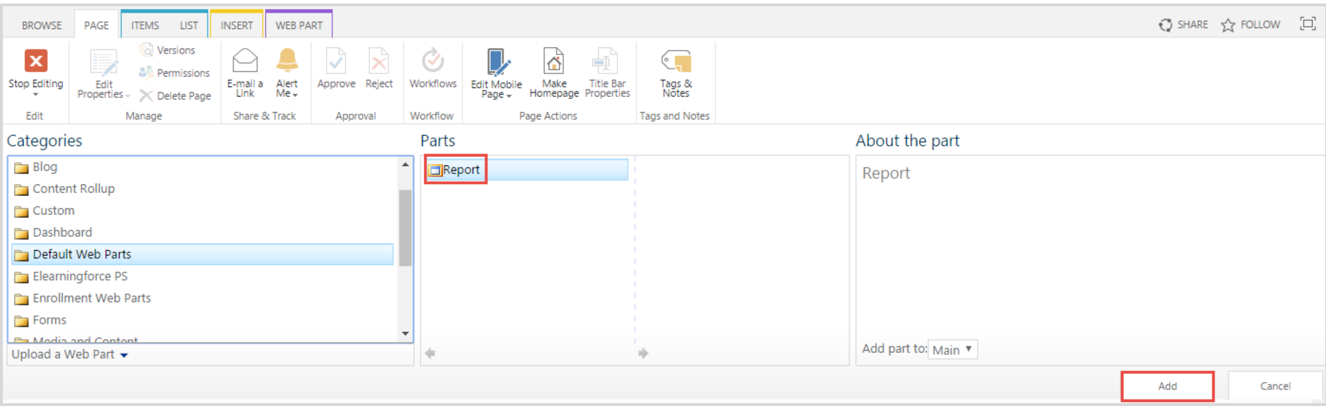
1. Open any web report page;
2. Go to Settings > Edit page;
3. Choose Report web part, and then click Export link:



4. Save Report web part file to your local computer (downloaded file has .webpart extension);
5. Go to Site Settings > Web Designer Galleries > Web parts;
6. Upload Report web part to Web Part Gallery:

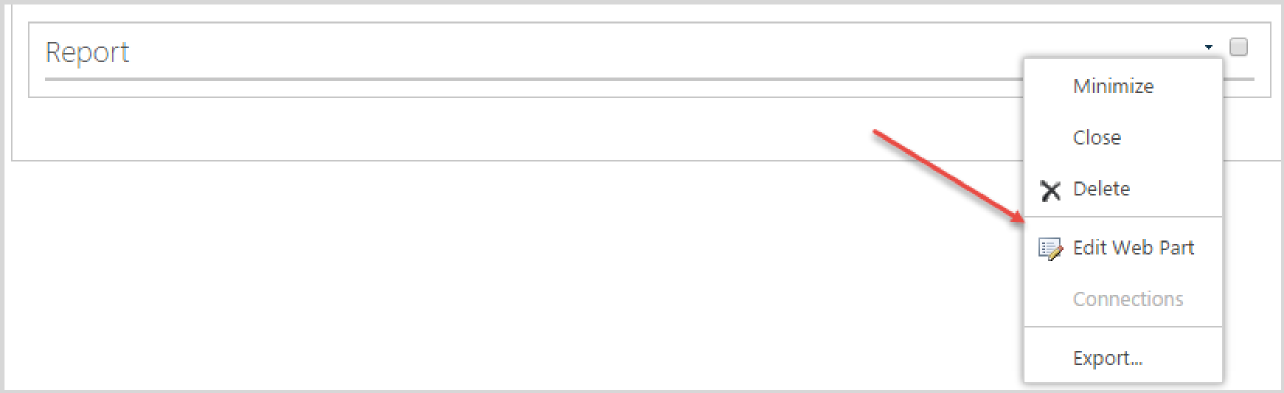


7. After uploading to Web Part Gallery, Report web part can be added to the necessary page:

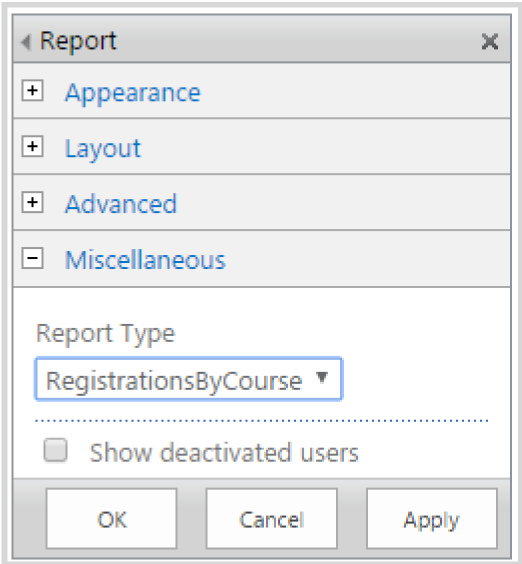


NOTE:	Depending on the settings specified during the upload, Report web part can be added to the Default Web Parts category or custom category.

8. In the Edit mode choose added Report web part and click Edit Web Part:



9. Expand category Miscellaneous and change the options according to your needs:

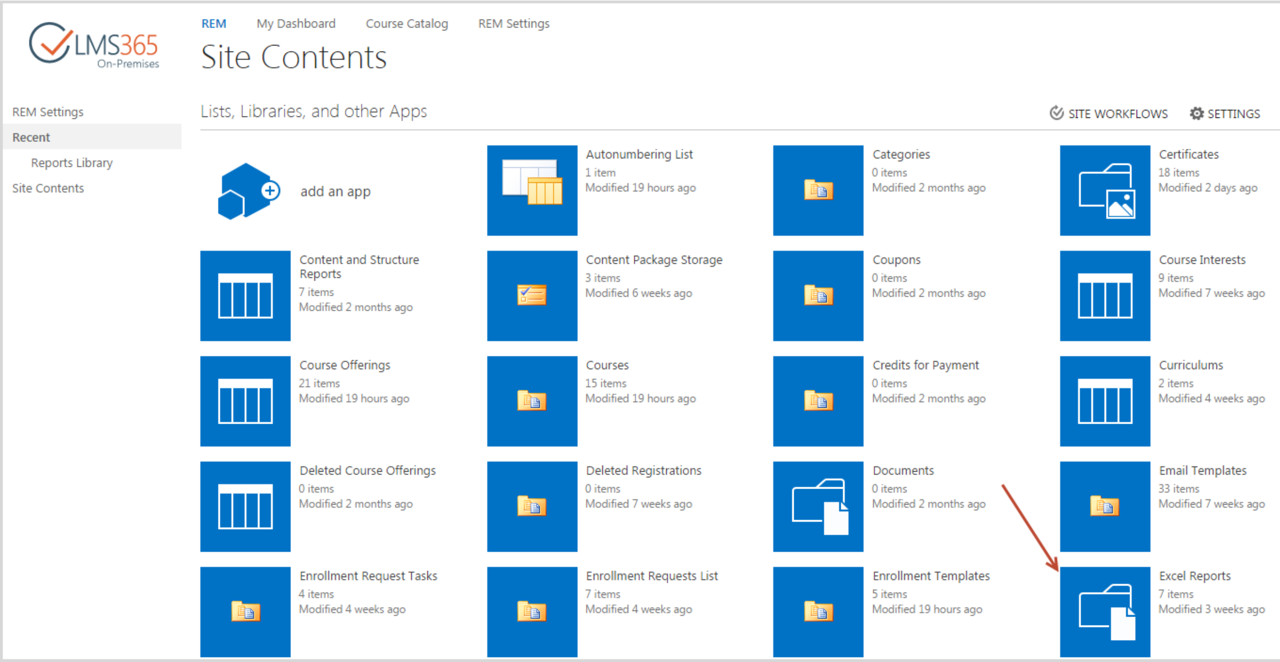


10. Click OK button to save the changes, and then Stop Editing button or Save button (depending on a page type) on the ribbon to add custom web report to the necessary page.

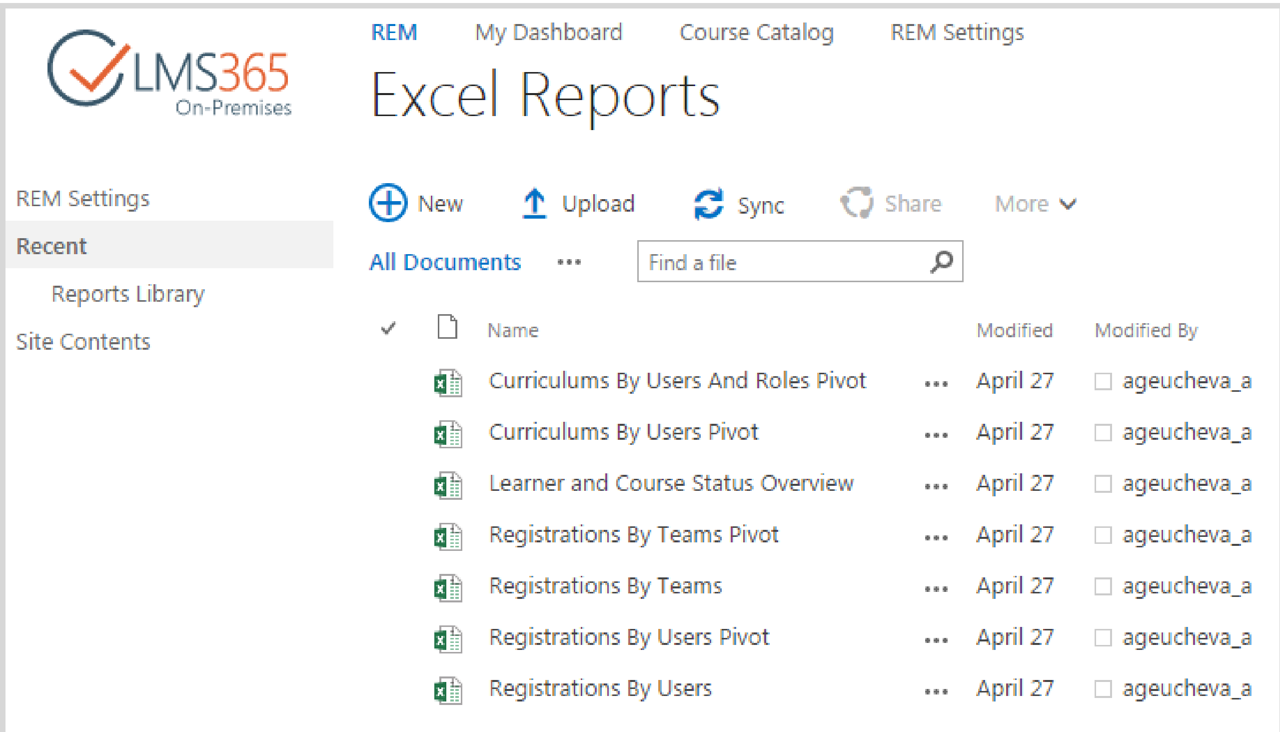
2. Excel Reports

To activate excel reports feature go to Site settings > Manage Site Features and activate "ELEARNINGFORCE - Reporting Center: Excel Reports Library" feature. We recommend you activate this feature on Dashboard site:

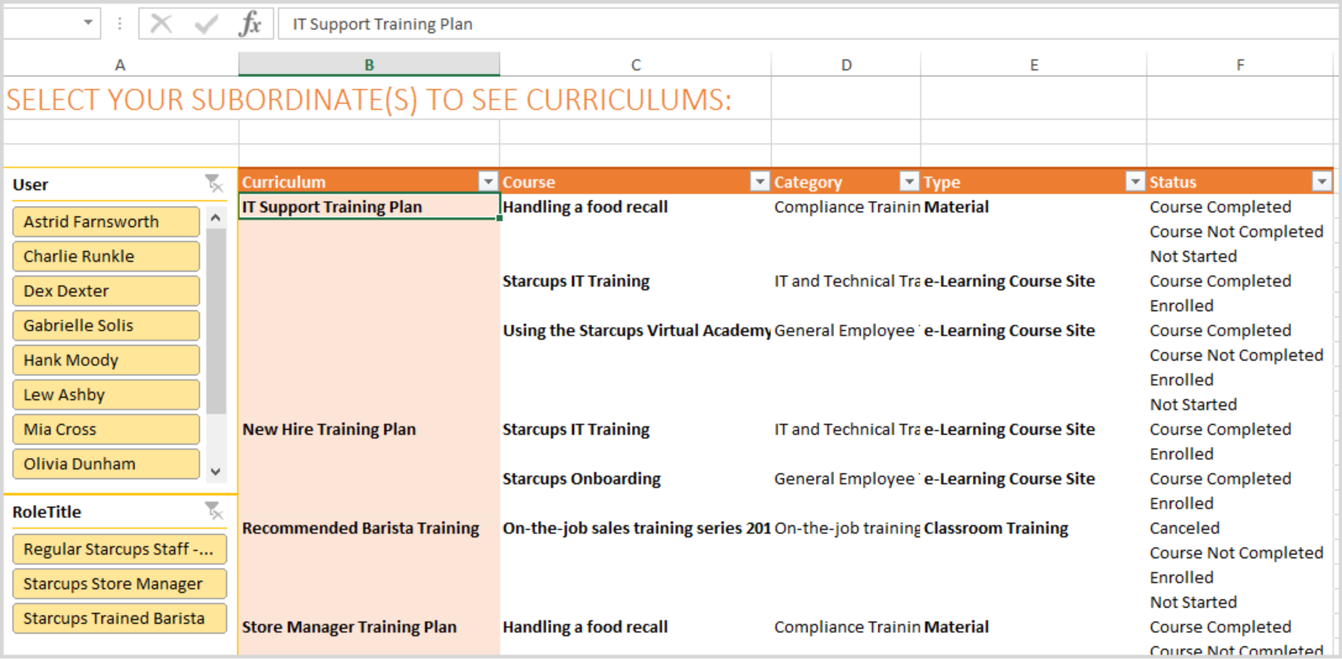
The feature adds Excel Reports Library in Site Contents > Excel Reports:



To view a report, go to Excel Reports Library and click on the report you need to view. This type of report allows viewing information about subordinated from SharePoint CCM solution who have the user assigned as manager in the profile field 'Manager' and in the 'Relationships' list:



Here is an example of what one of the reports look like when opened in Excel:

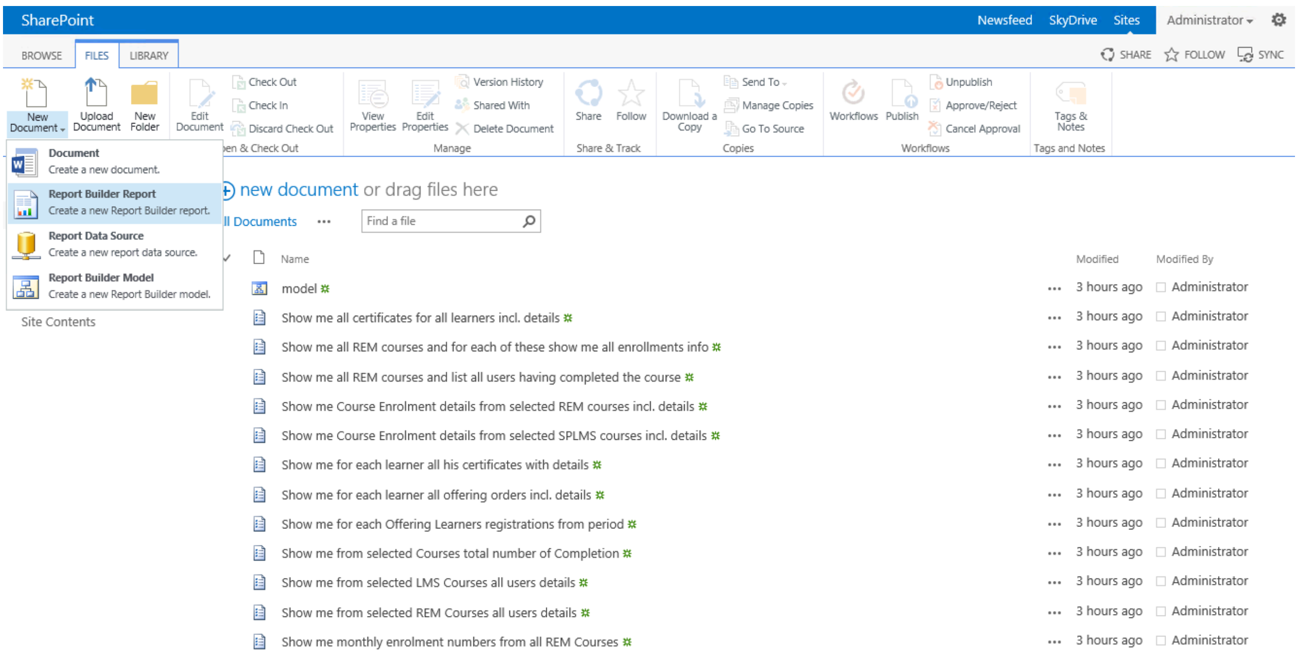


NOTE:	Connection works only in case user is logged to client machine and SharePoint from one domain. Different domains setup is not supported.

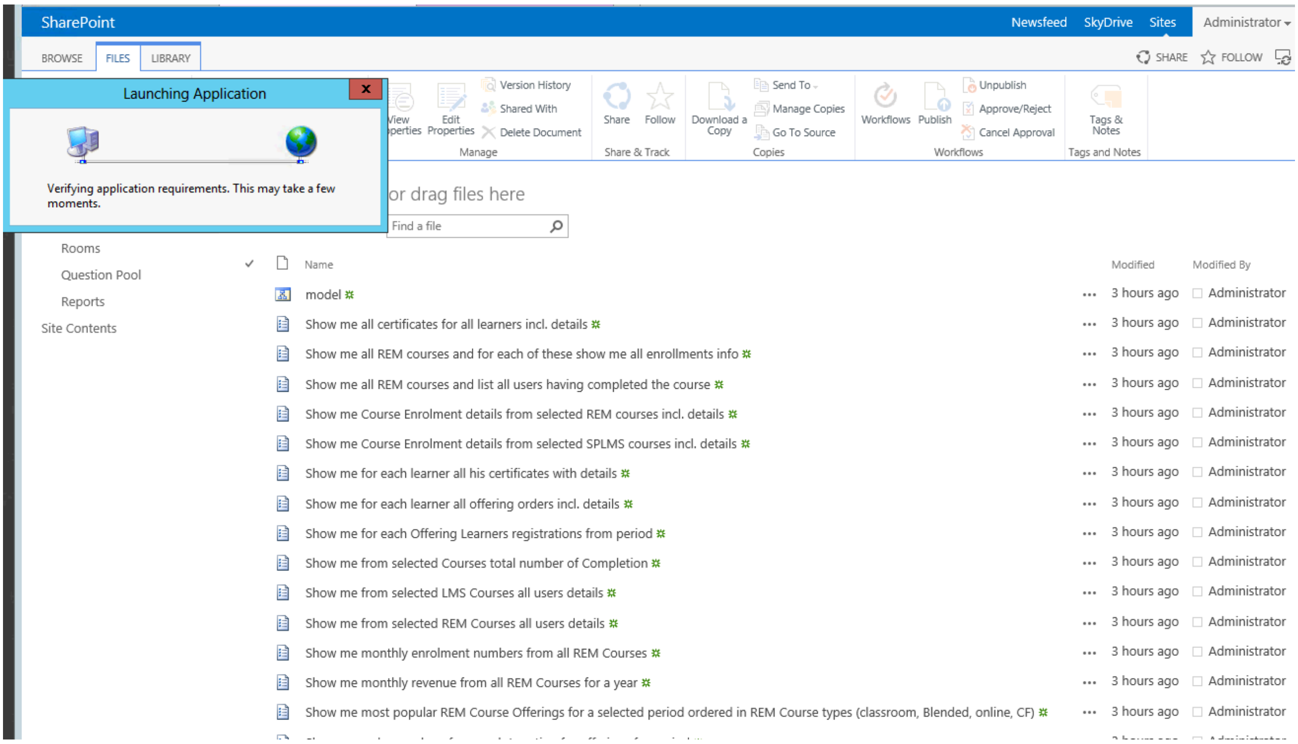
3. SQL Reports

2.13.1 New Report creation

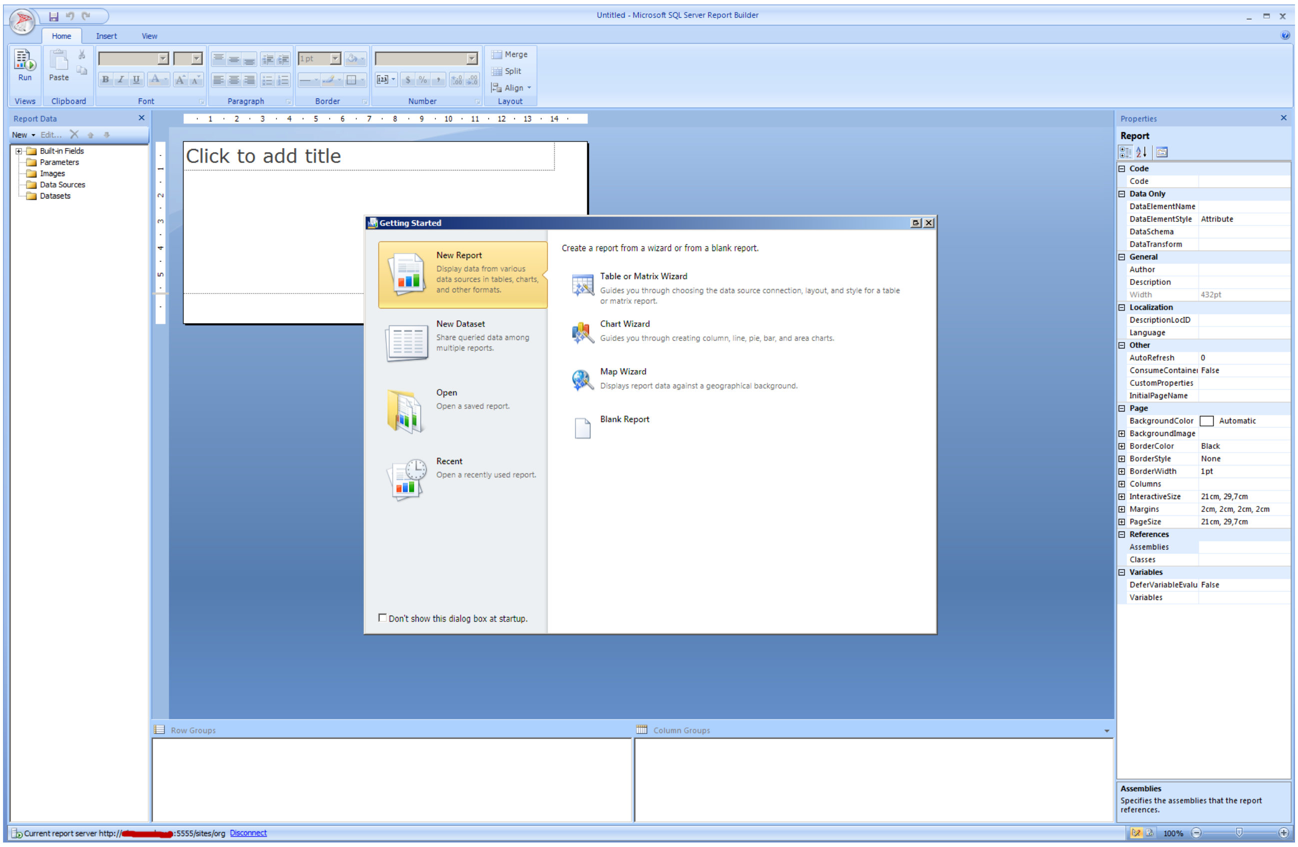
1. To create a new report, first you need to go to the reports list and click on “Report Builder Report” button:



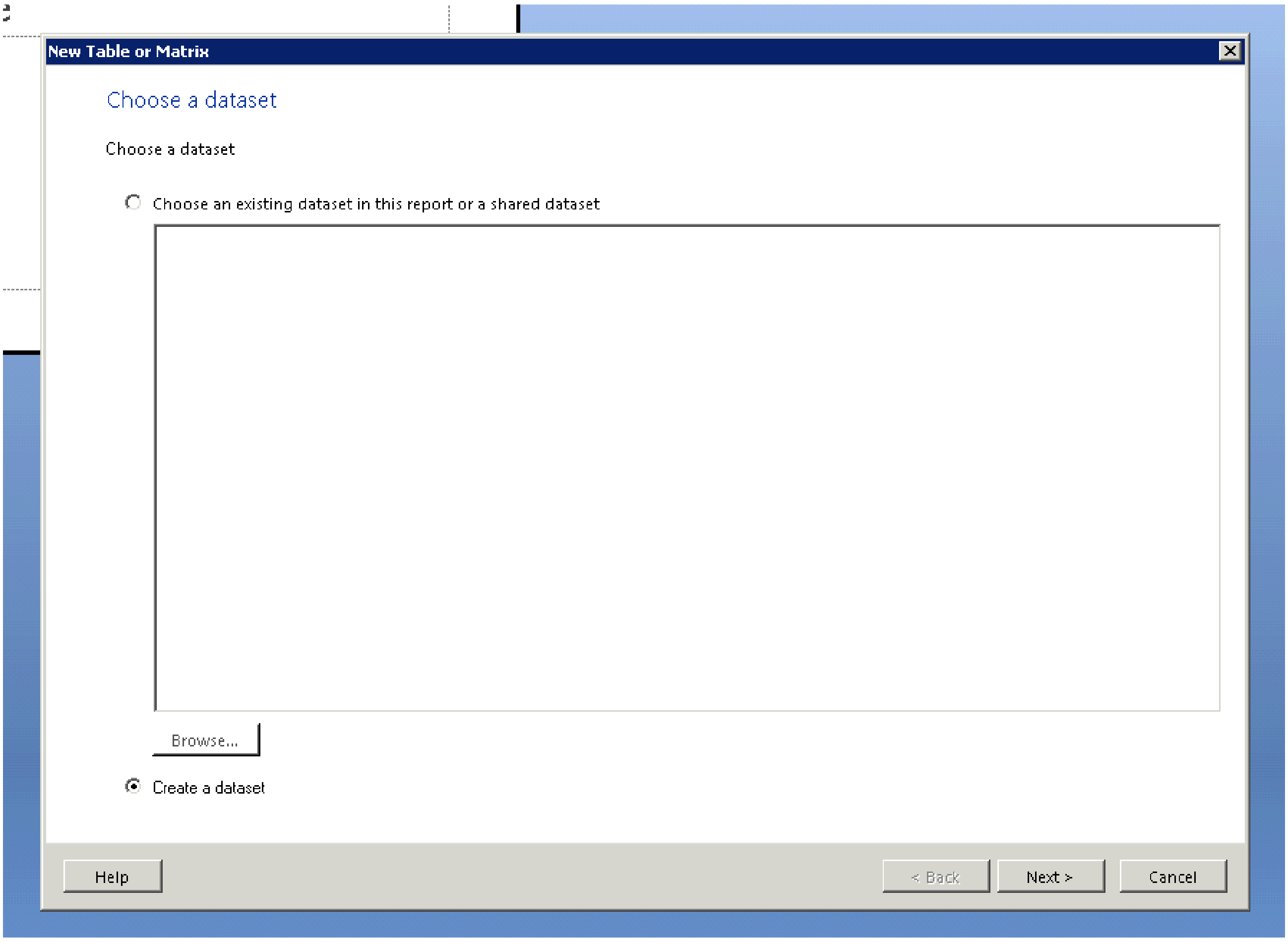
2. Next, the system will install MS SQL Server Reports Builder using Click Once or just open it if it is already installed:



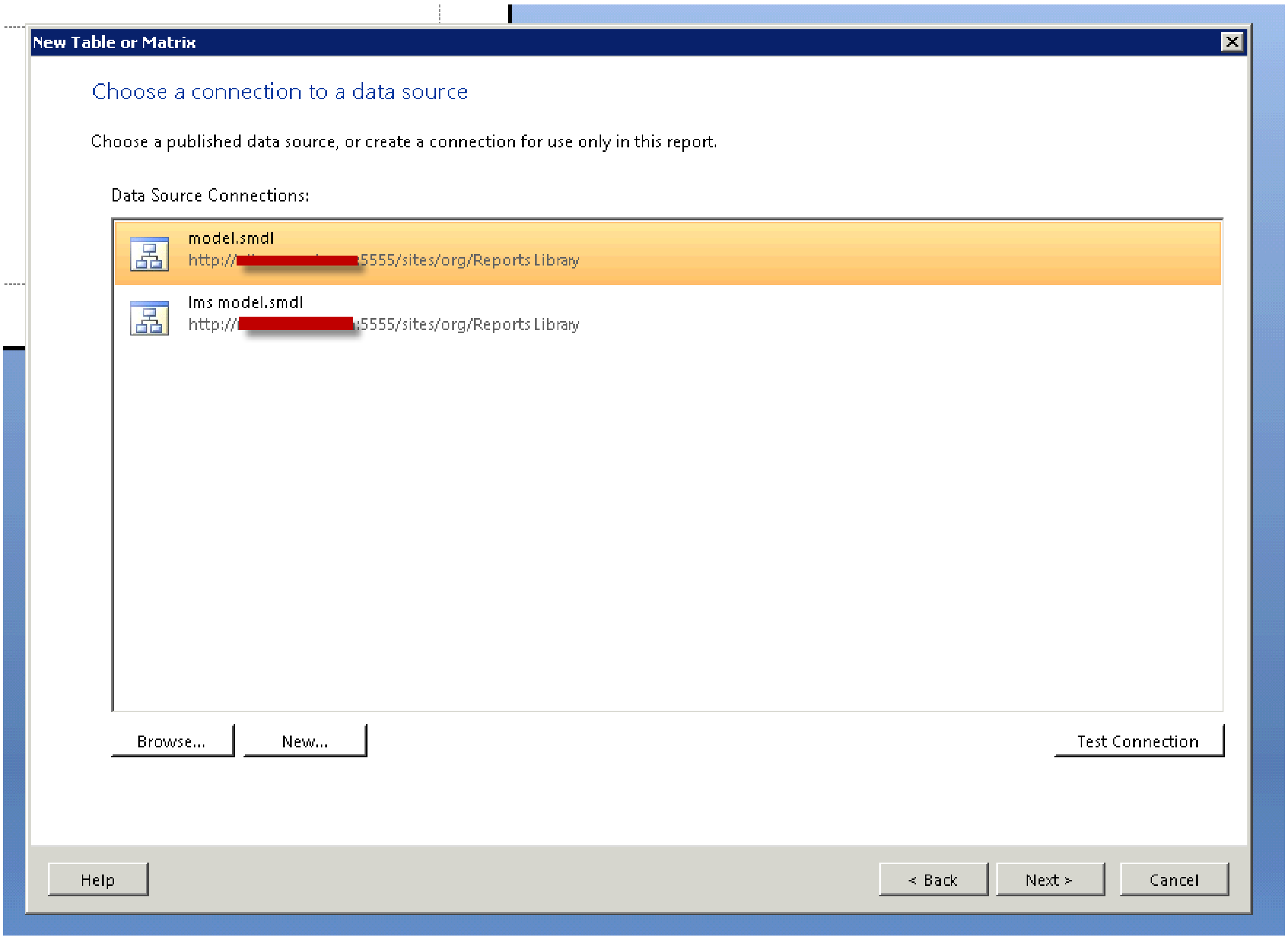
3. Next, MS SQL Server Report Builder will be opened. For example, you can create a report with a table of data. To do it you need to click on the “Table or Matrix Wizard” first (user also can choose this option later from the ribbon menu):



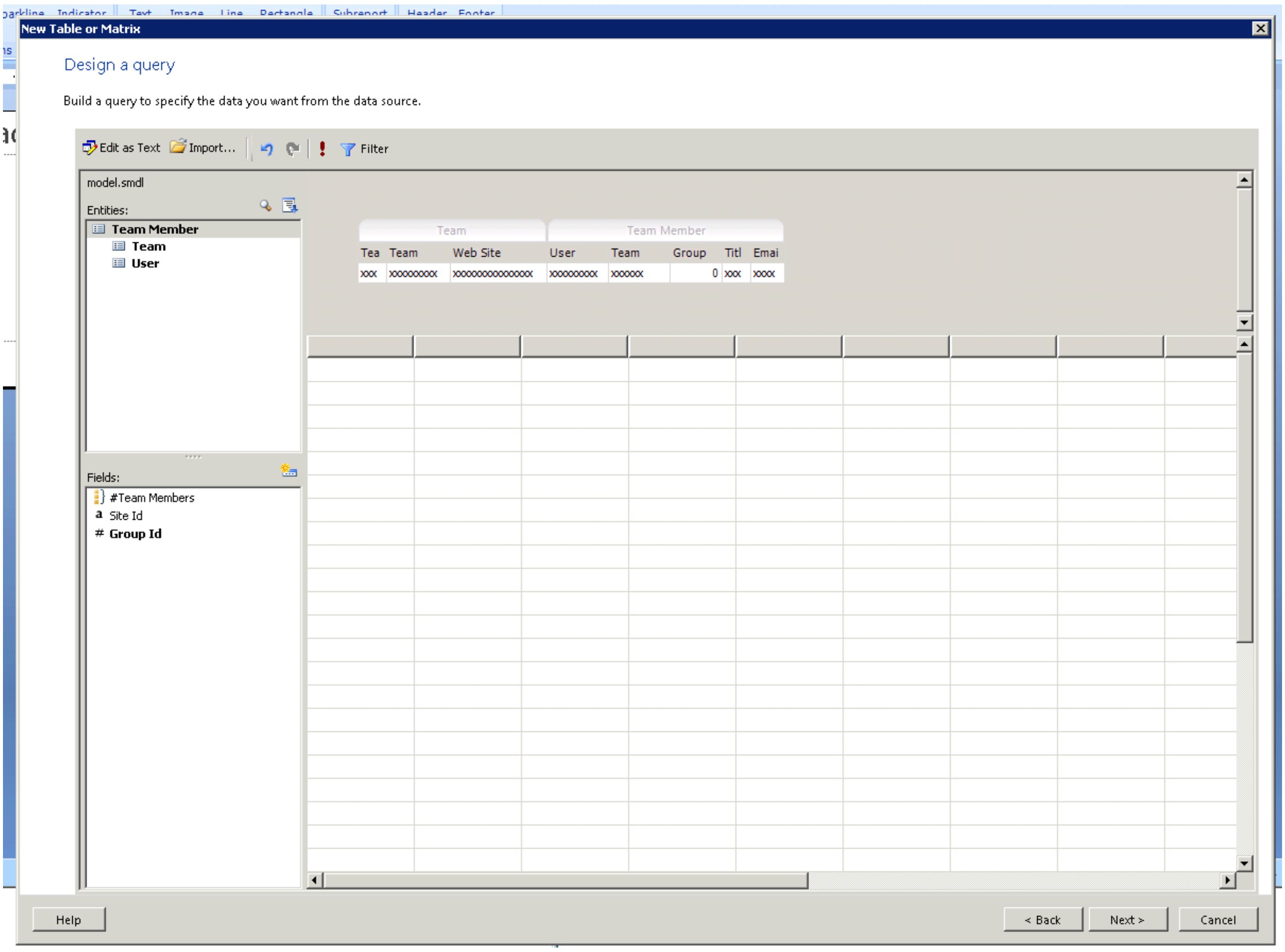
4. The first step of the wizard is “Choose a dataset”. Select the “Create a dataset” option. Click “Next”:



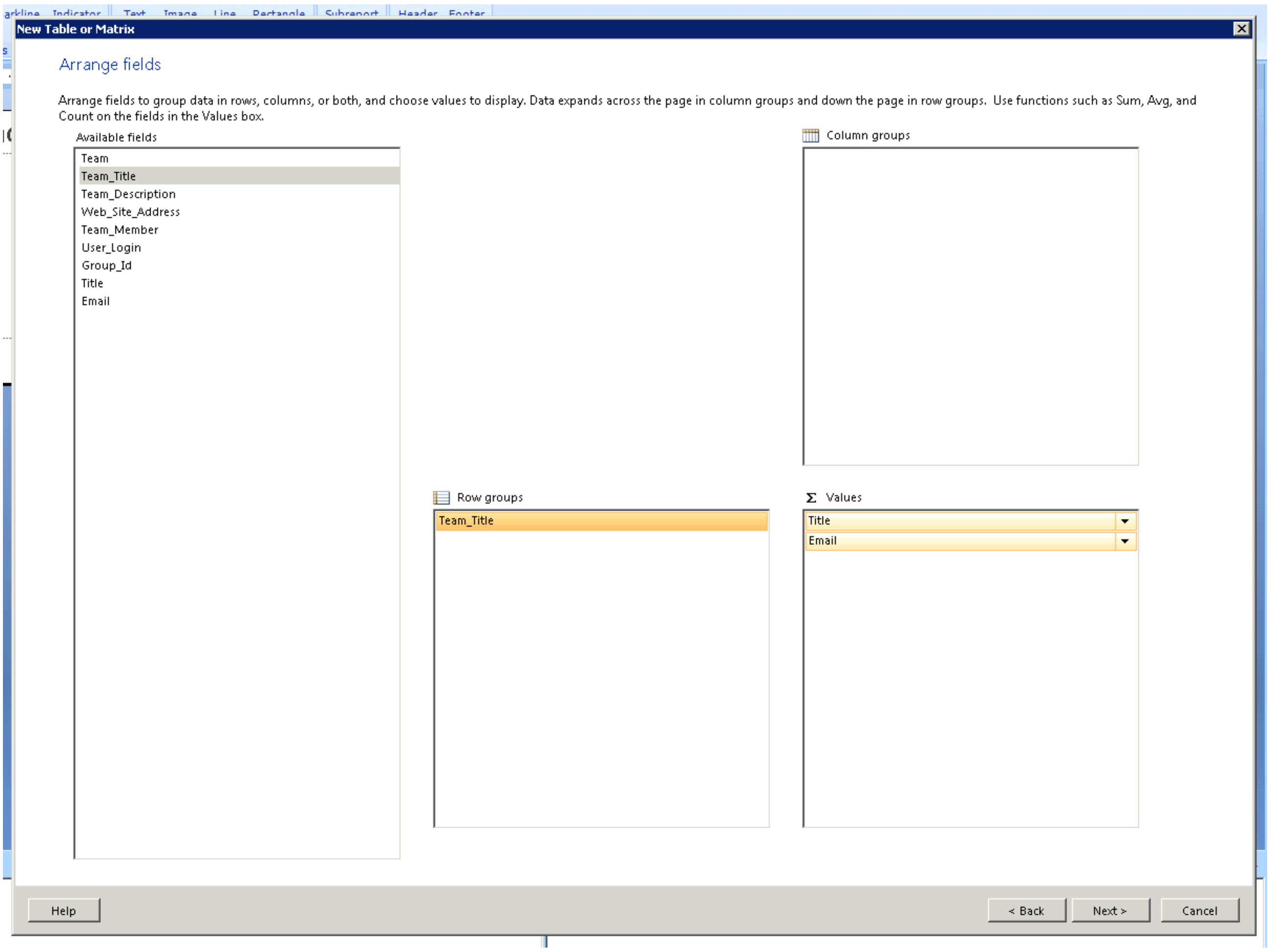
5. The next step is “Choose a connection to a data source”. You need to choose a model to create a report data source. The default model of the reporting database is stored in the Reports Library. Choose the model and click “Next”:



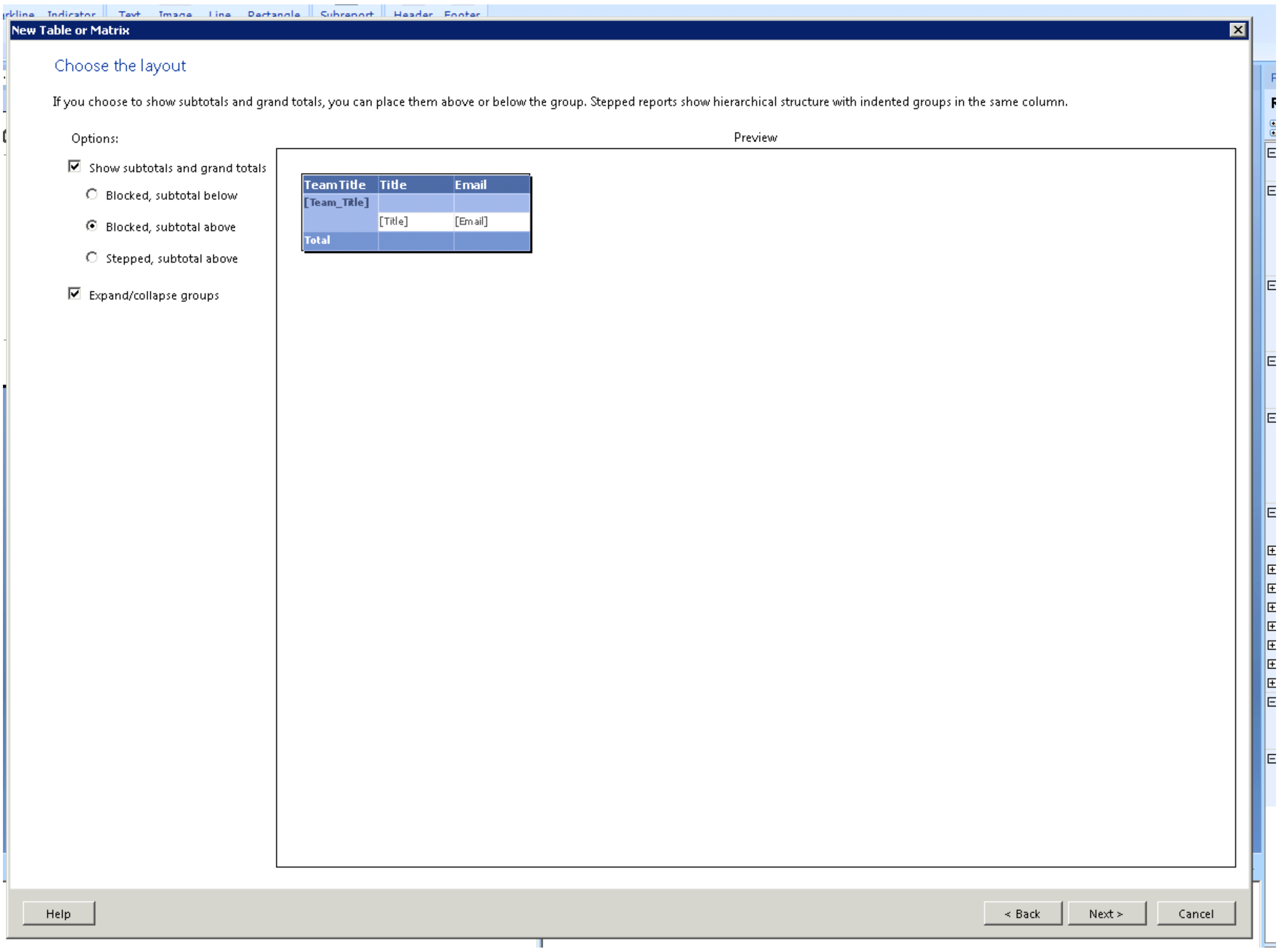
6. The next step is “Design a query”. You need to choose entities and its fields for the data source of the report. For example, you can choose “Team Member”, “Team” and “User” entities. Click “Next”:



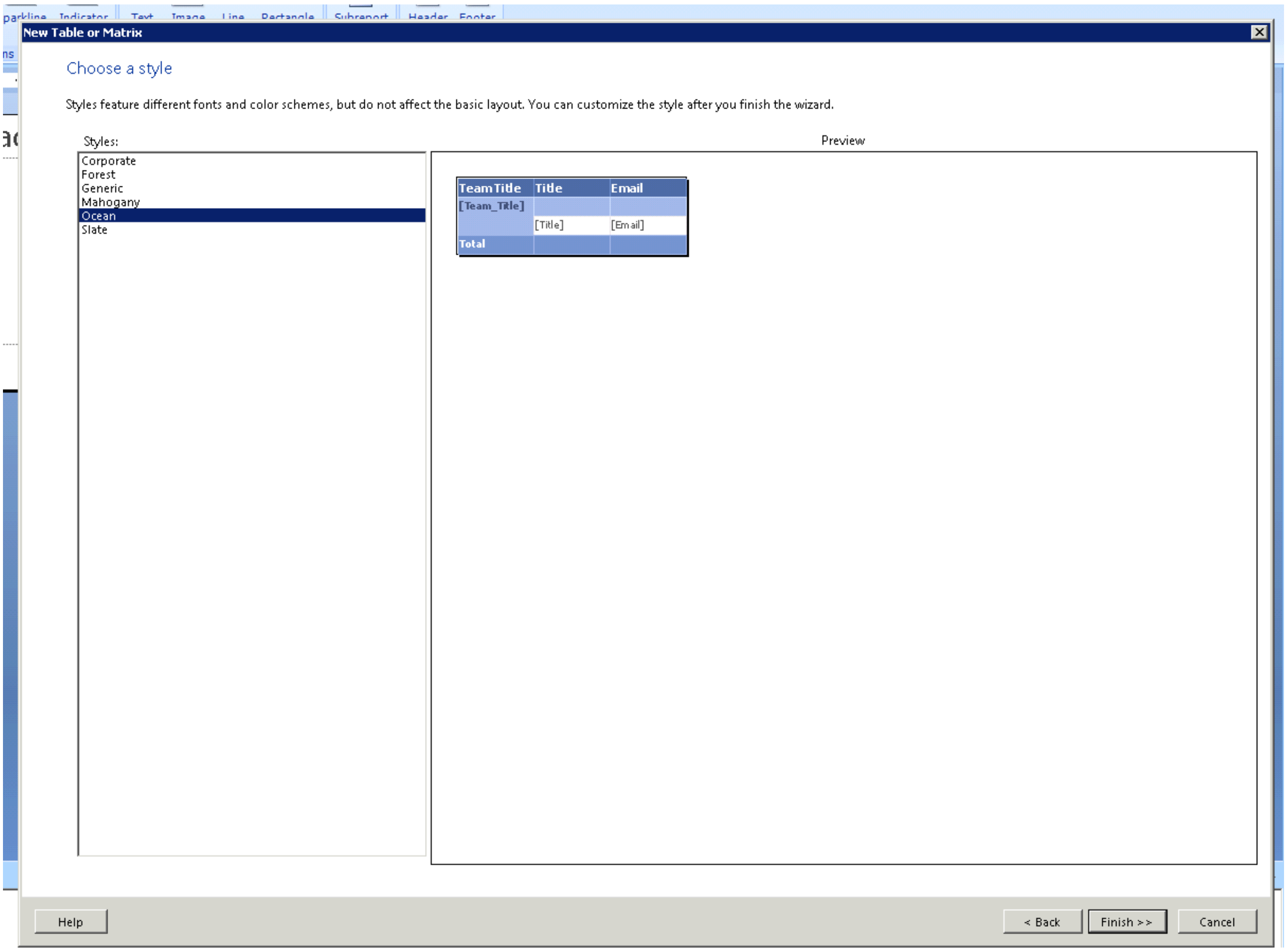
7. The next step is “Arrange fields”. Here you can choose fields that will be shown in the report table and arrange them in groups. Click “Next”:



8. The next step is “Choose the layout”. Here you can choose layout for the report table. Click “Next”:



9. The next step is "Choose a style". Here you can choose one of the predefined styles for the report table. Click "Finish >>":

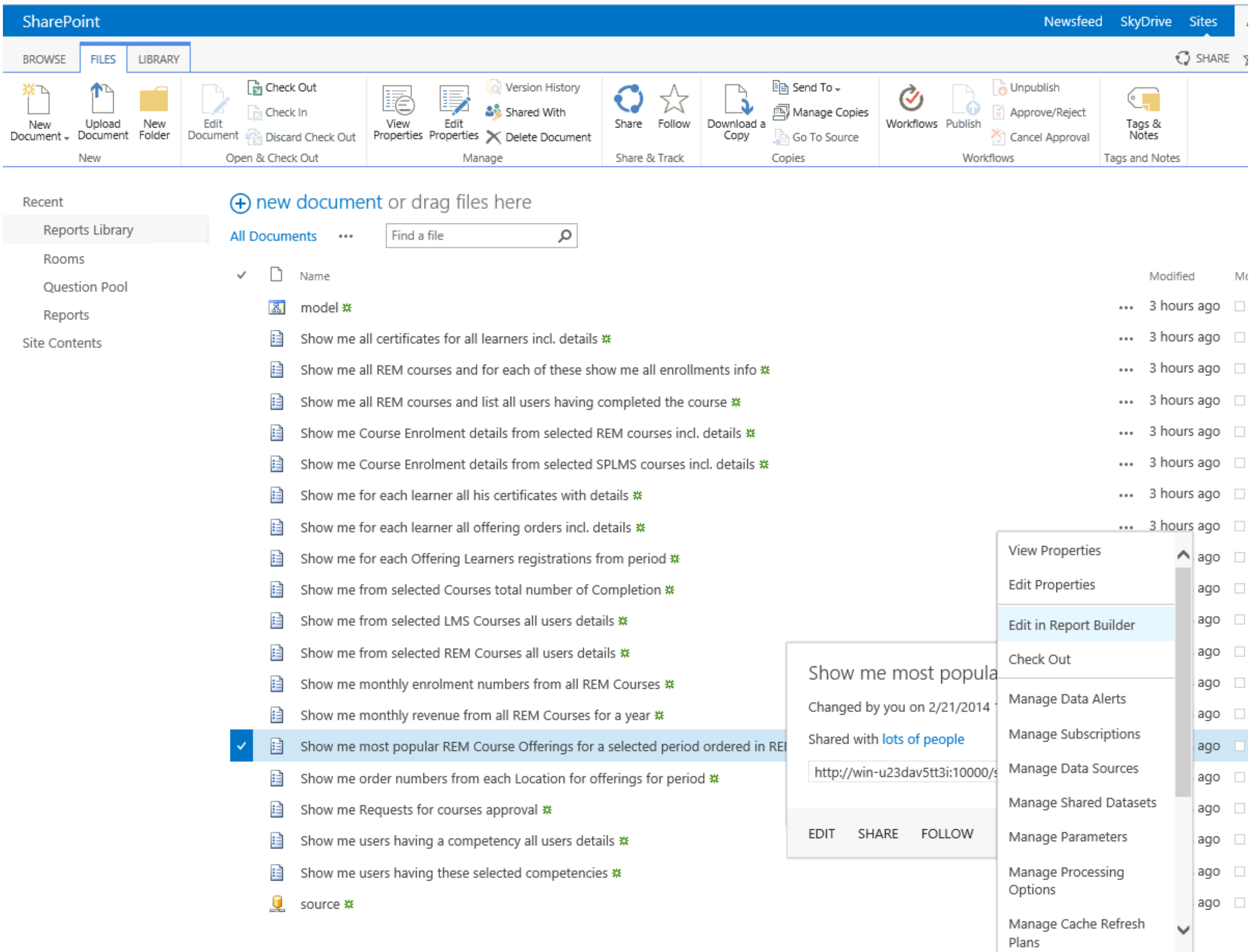


10. The table is created. Now you can choose the report layout, set the report title, set any options using properties window, configure data sources and parameters using report data window, run the report to view results and so on. You can save the report in the reports library using "Save as" button in the ribbon menu.

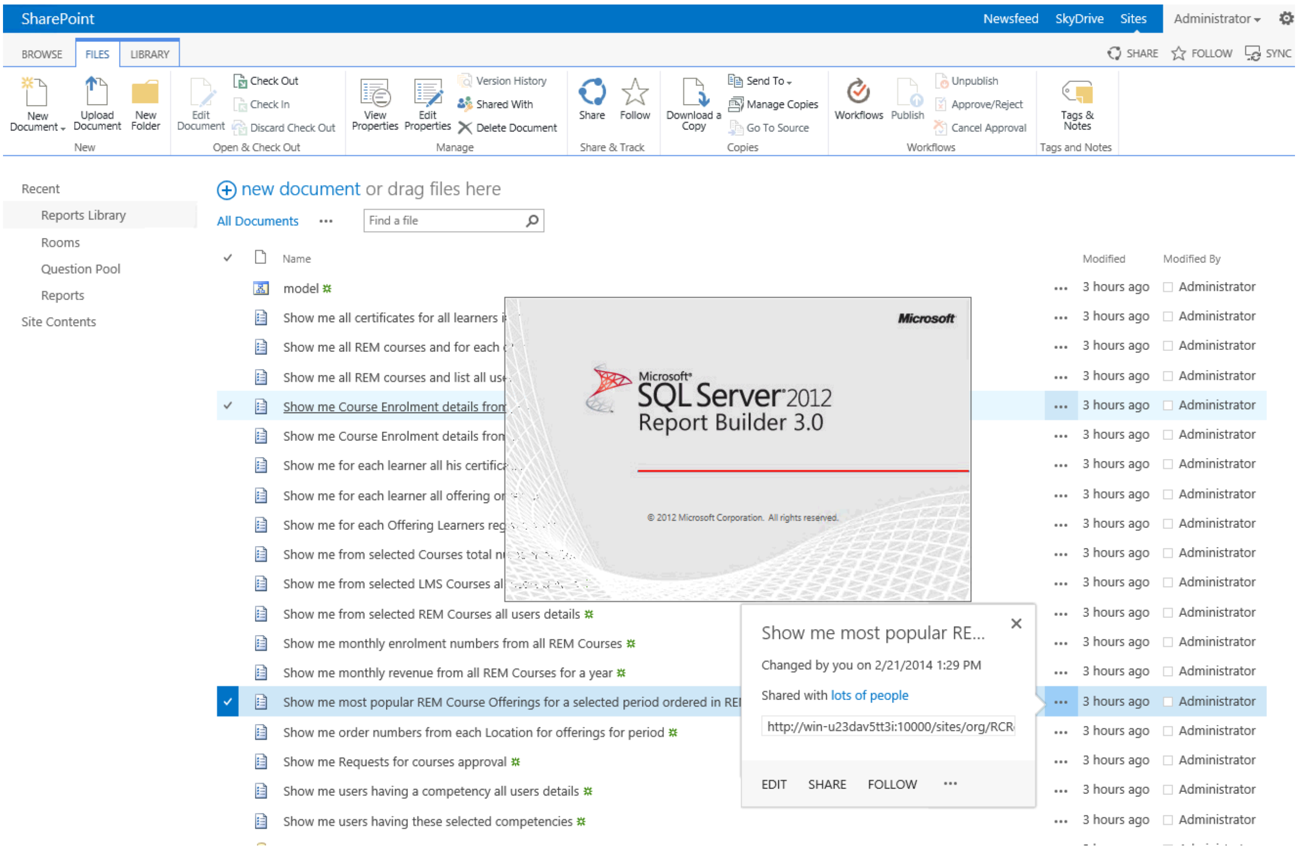
NOTE:	To get more info about working with the MS SQL Server Report Builder check this link http://technet.microsoft.com/en-us/library/dd220460(v=sql.105).aspx

3.13.2 Editing Report

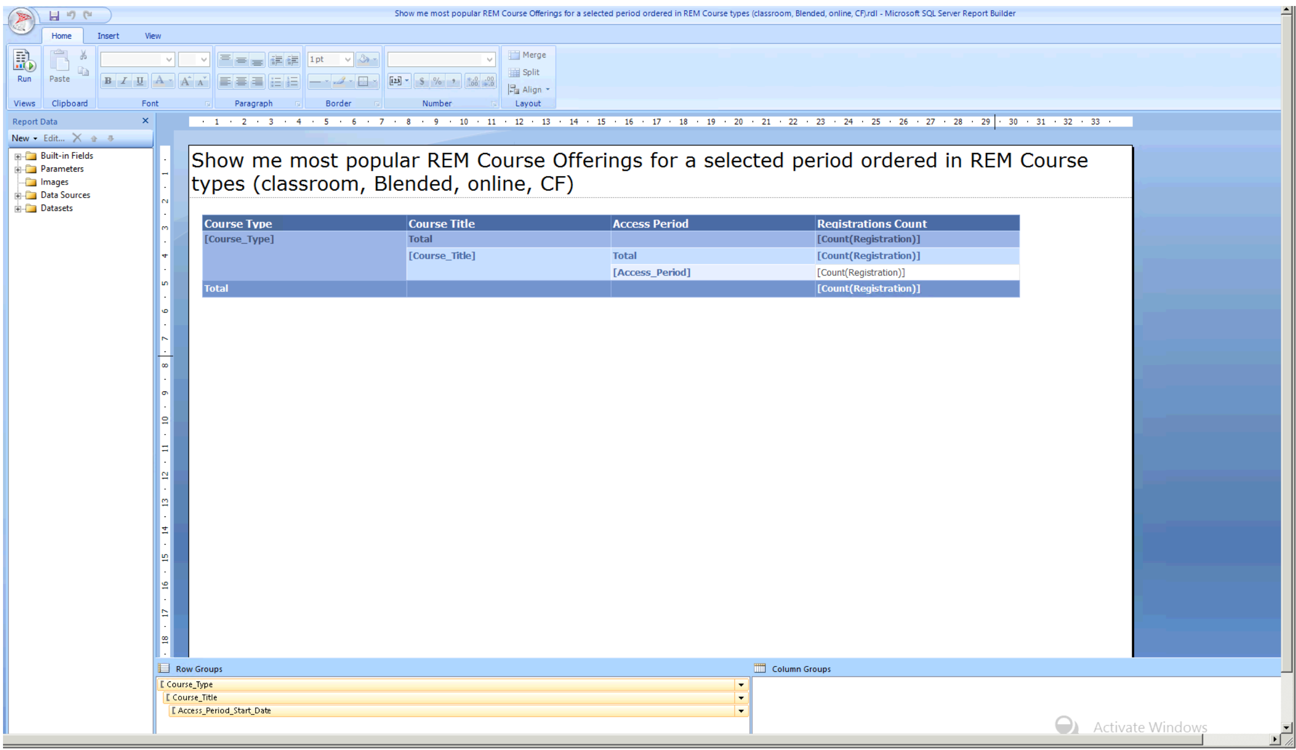
To edit an existing report (add some branding, extra columns, new tables, etc.) you need to go to the Reporting Library (this library is created by the Reports Library feature).
Then you need to choose "Edit in Report Builder" option for the report you need to edit:



SQL Server Report Builder will be loaded automatically:

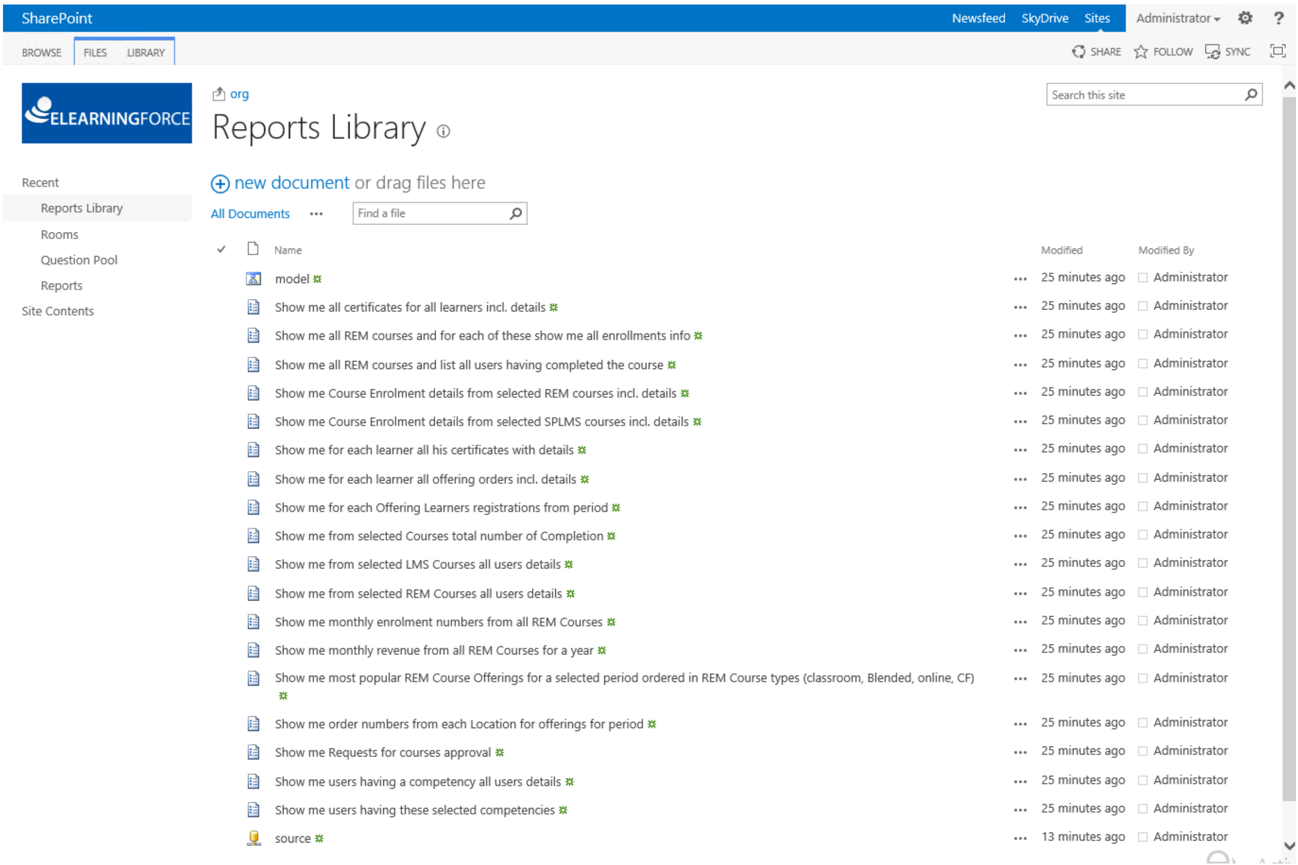


When the report builder is loaded you will be able to make any changes in the report template and save it to existing or as a new report:

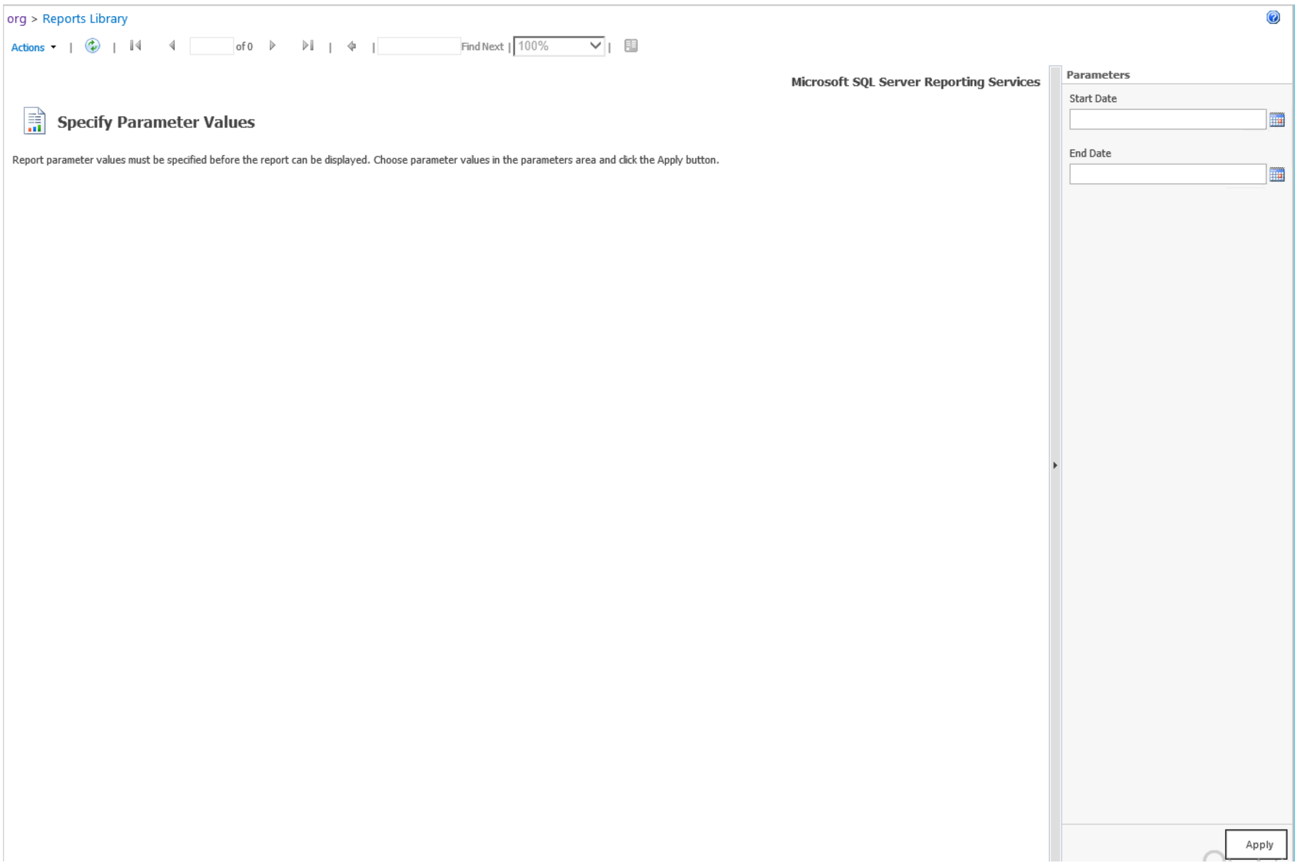


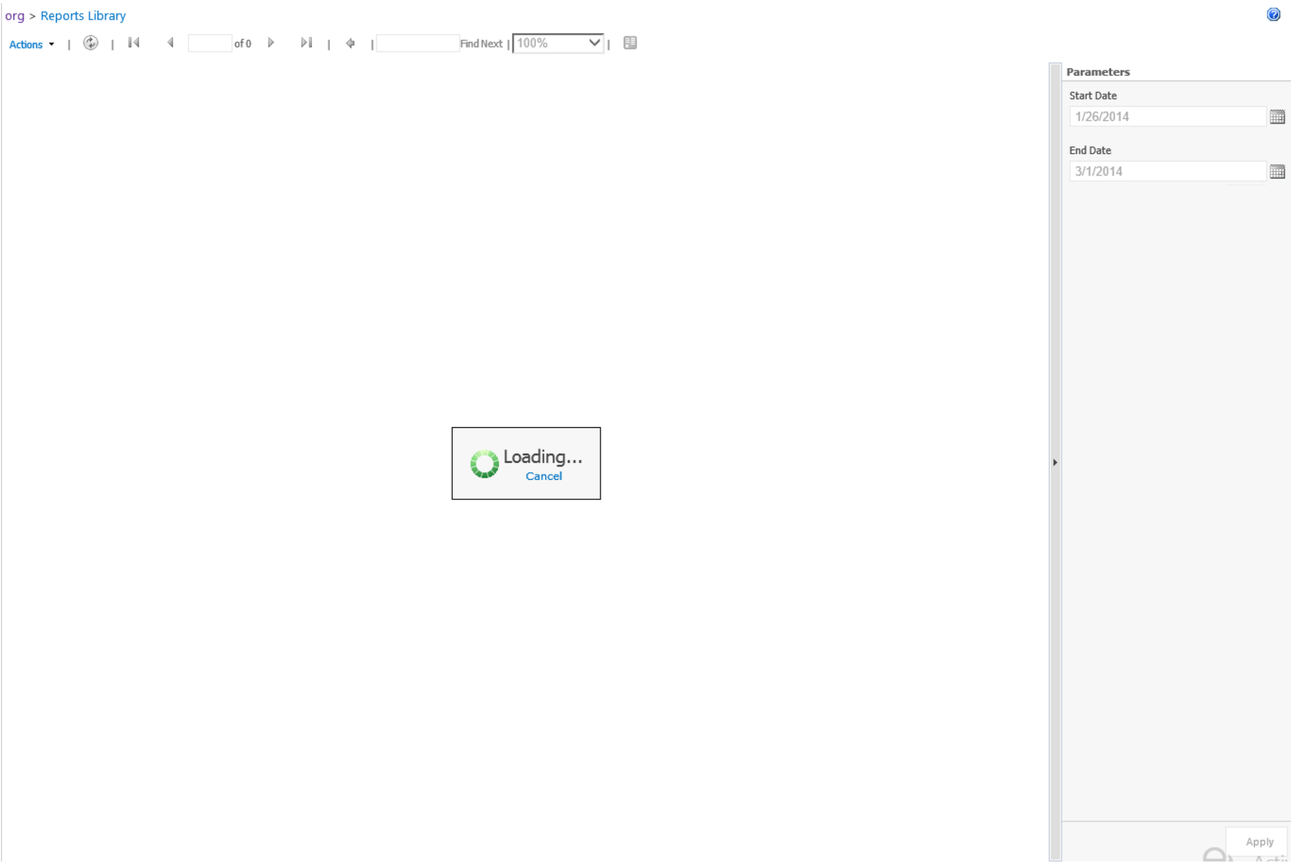
4.13.3 Viewing Report

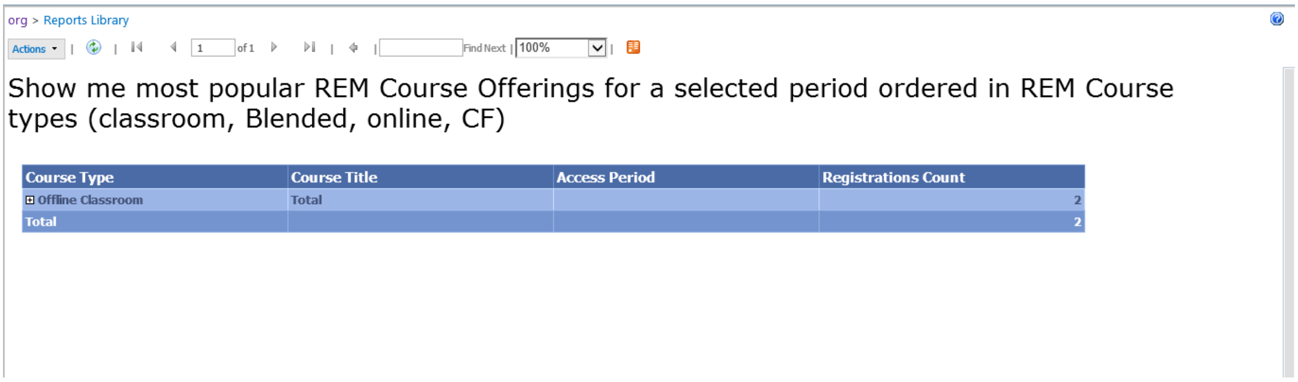
To view a report, go to the Reporting Library (this library is created by Reports Library feature) and click on the report you need to view:



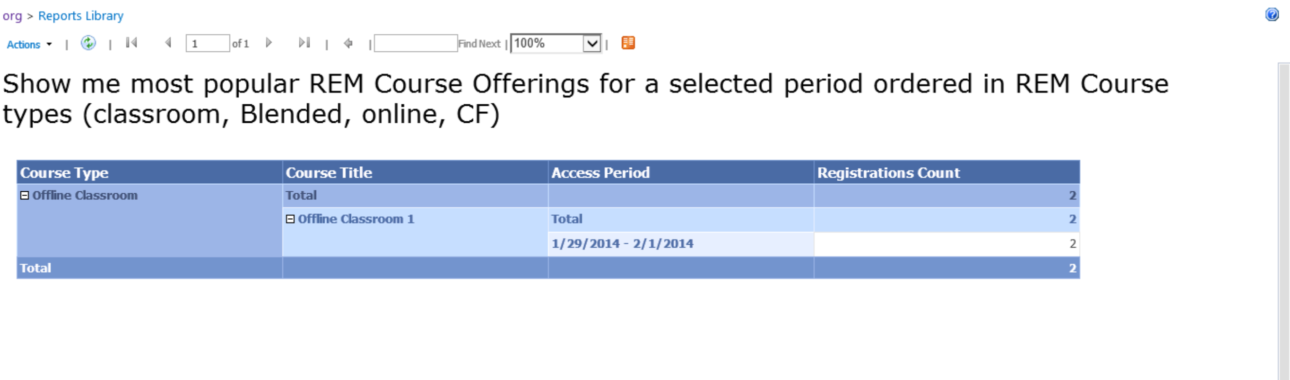
Report Viewer page will be opened. Specify the required parameters (if it is necessary). Then the report will be loaded:



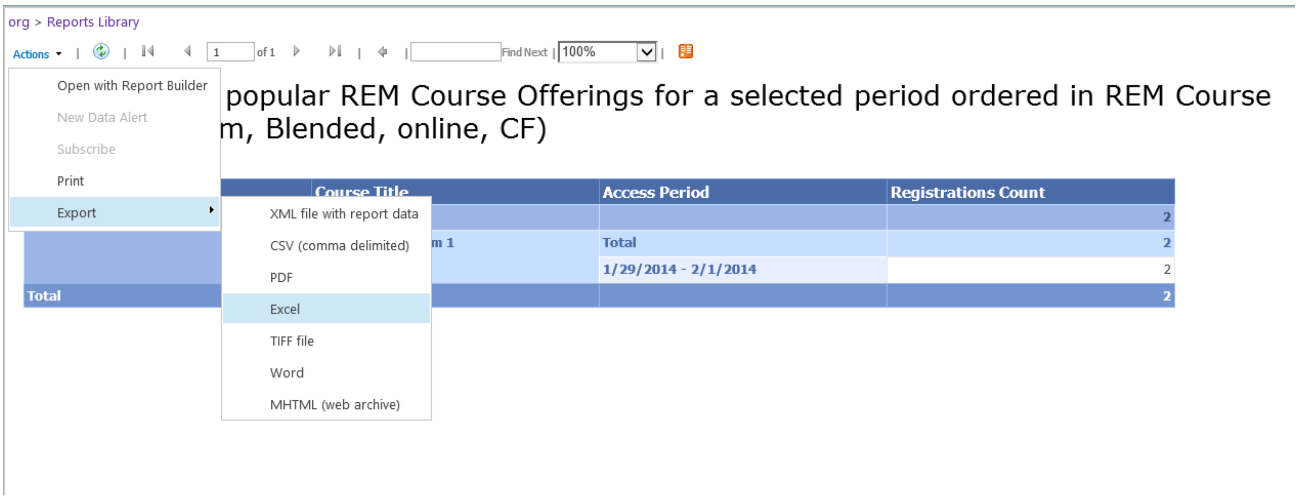




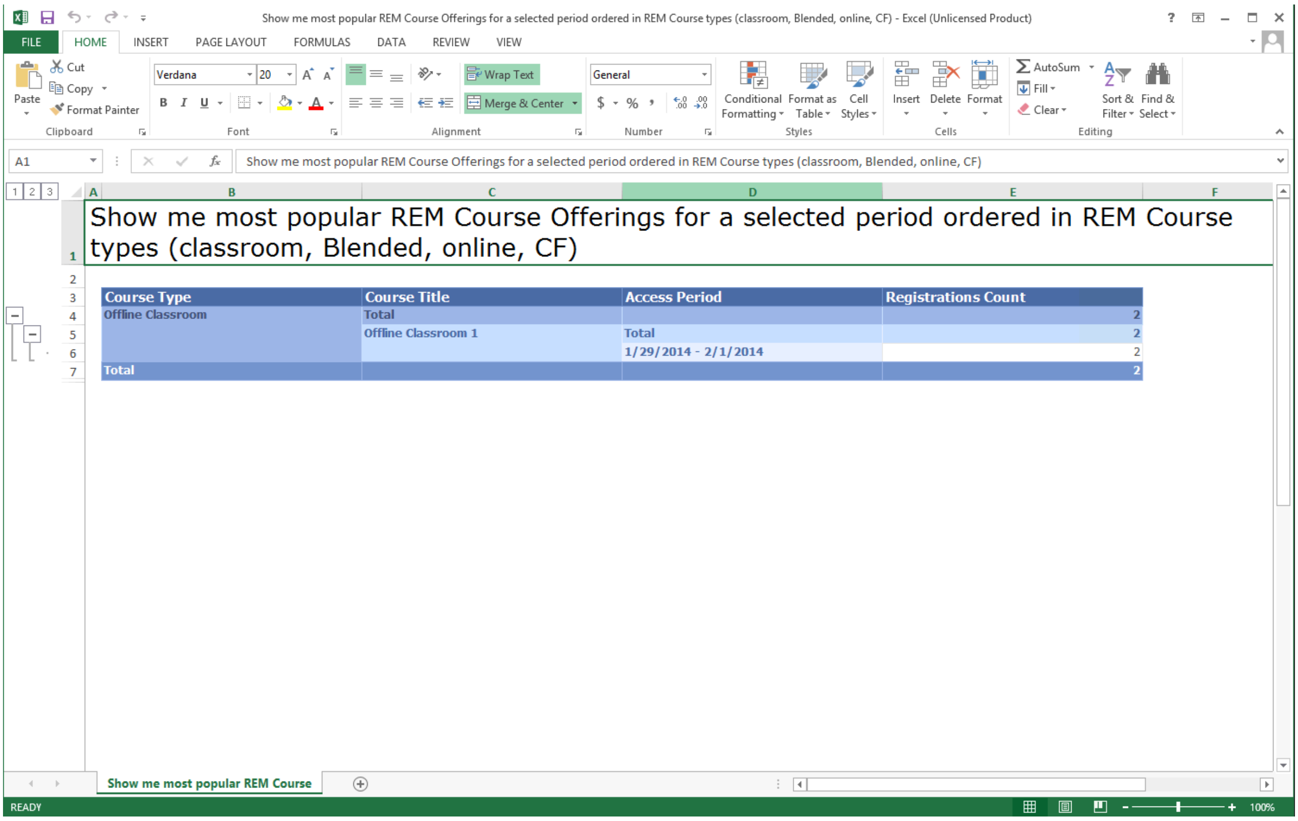
By default, all canned reports are loaded in the groups collapsed mode. To view the detailed information, click on the "+" icon:



Using "Actions" menu you can open the report with Report Builder, Print or Export report to the one of the listed formats:



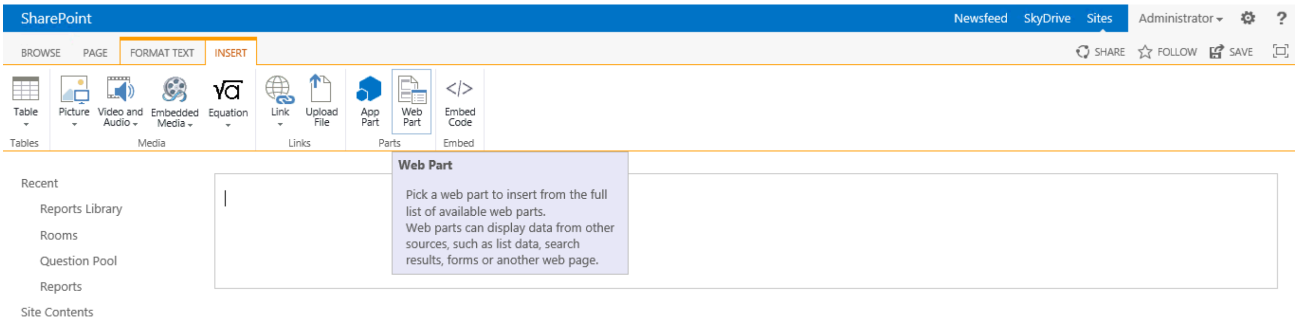
Example: Report exported to Excel:


Show me most popular REM Course Offerings for a selected period ordered in REM Course types (classroom, Blended, online, CF)

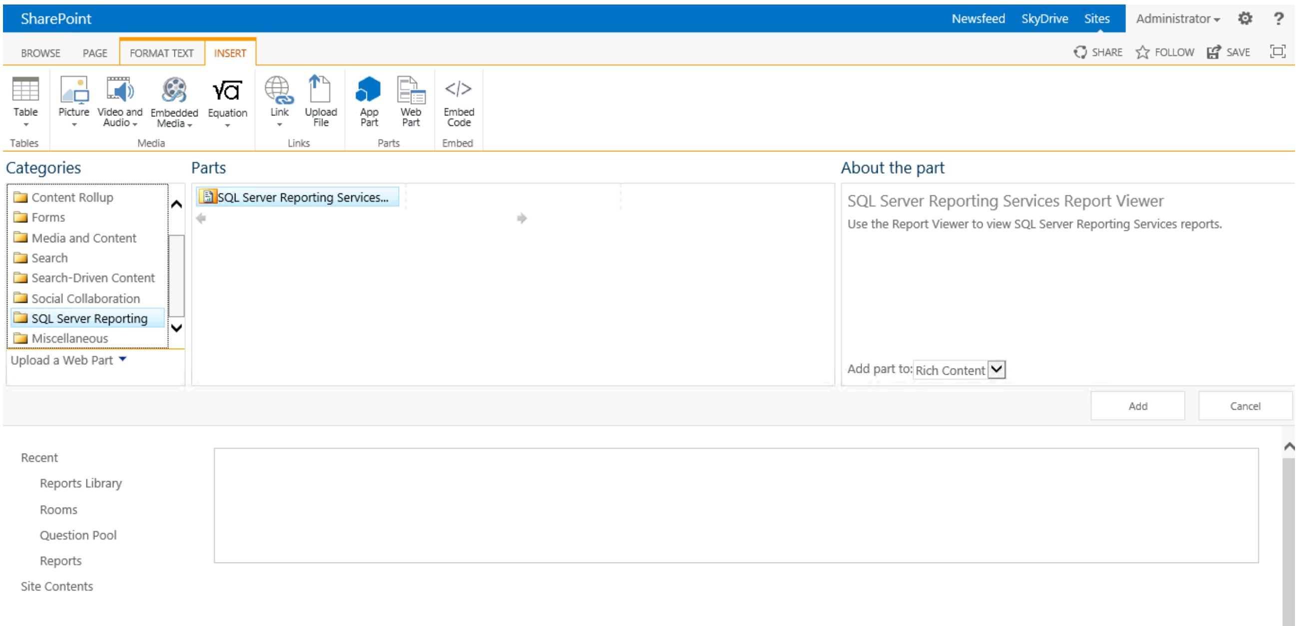
Course Type	Course Title	Access Period	Registrations Count
Offline Classroom	Total		2
	Offline Classroom 1	Total	2
		1/29/2014 - 2/1/2014	2
Total			2

5.13.4 Adding Report web parts

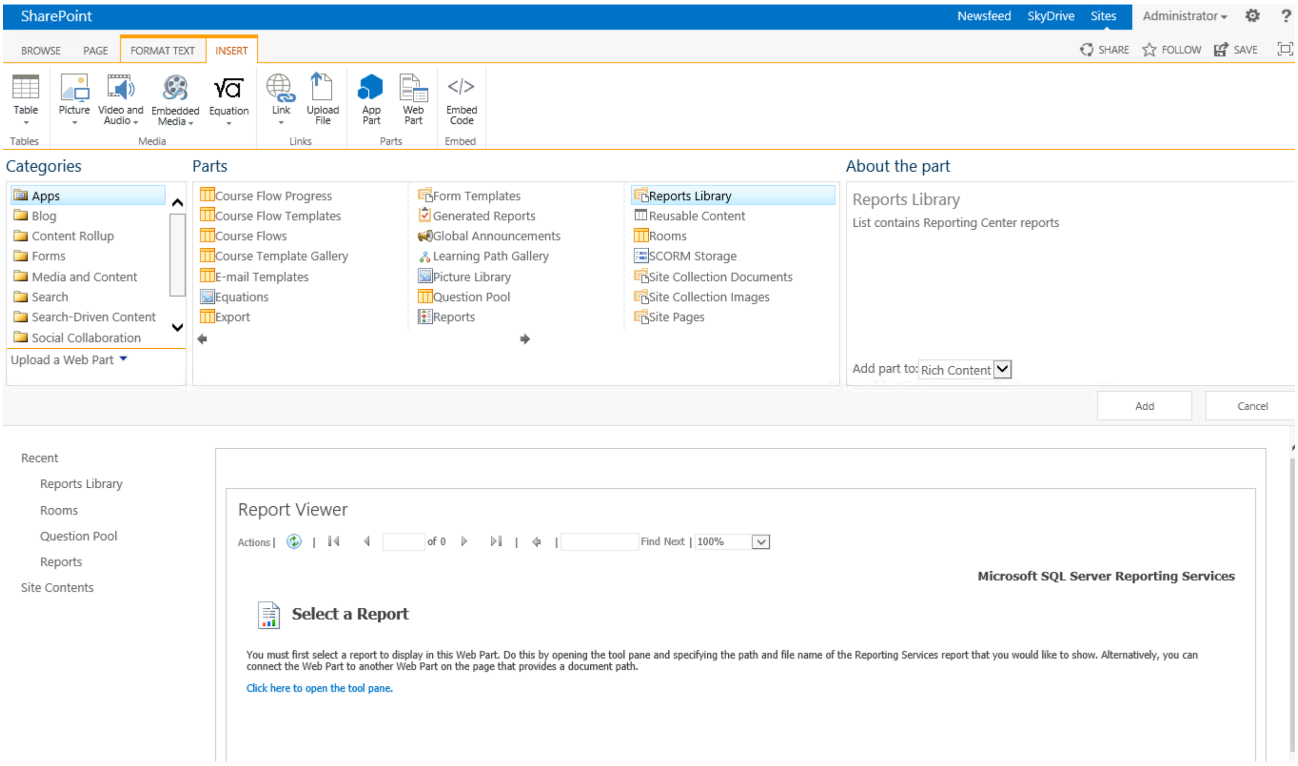
Also, you can use report functionality on the web part pages, like Publishing Pages or Site Pages. To use it, open the page edit mode and click Insert -> Web Part option in the ribbon menu:



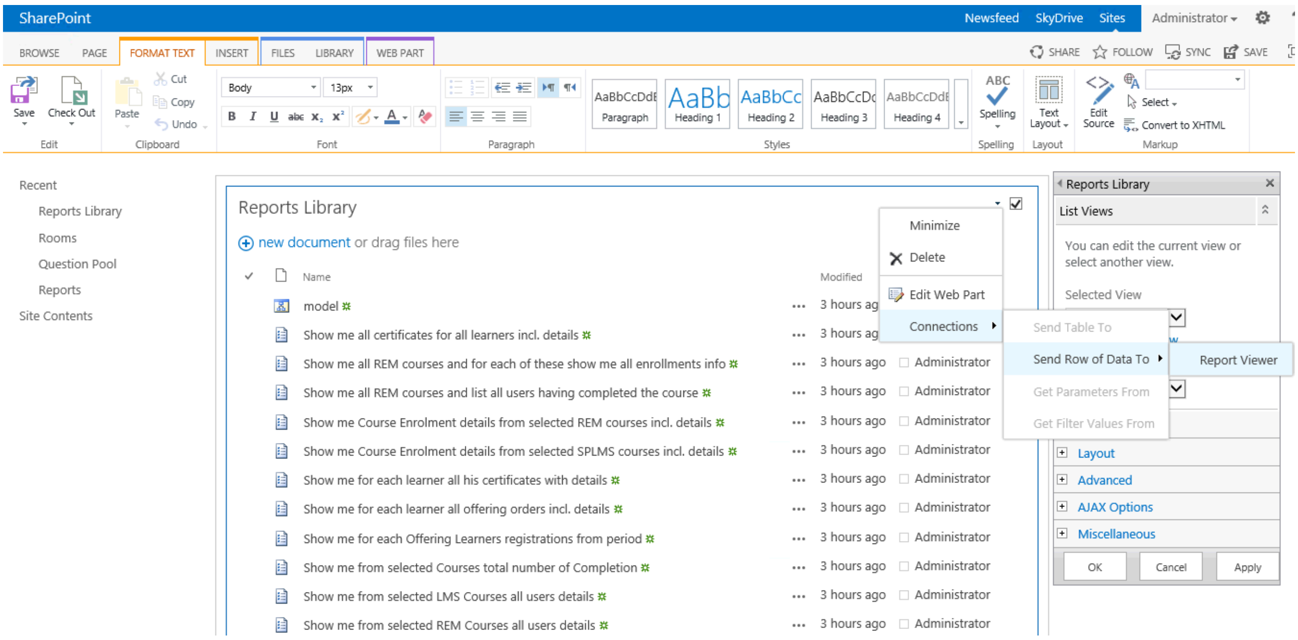
Find the SQL Server Reporting Services Report Viewer web part and add it to the page:



Then add the Reports Library web part to be able to choose reports from the list without page editing:



Specify the connection between web parts and save the page:



Now you can choose any report from the list and it will be loaded to the Report Viewer web part: