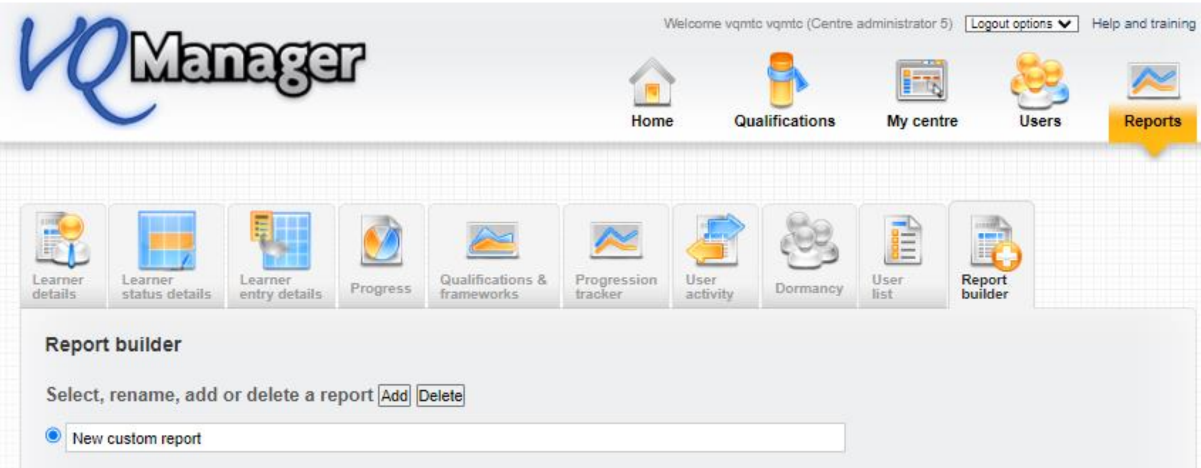
Bespoke Reporting

There is a report builder for assessors, IQAs, Employers, OSU and Centre Administrators, so users can create and save their own, bespoke reports.

The function allows for:

- unlimited number of bespoke reports for each user
- option for adding new reports
- option for deleting a report

On first opening this tab, there is one report showing for the user, called 'New custom report'. It has the User ID selected.



Select the columns to include in the report Clear

Learner
- [ ] User ID
- [ ] Surname
- [ ] First name
- [ ] DOB
- [ ] Email
- [ ] Phone, default
- [ ] Phone, home
- [ ] Phone, mobile
- [ ] Address line 1
- [ ] Address line 2
- [ ] Address line 3
- [ ] Address line 4
- [ ] Postcode, home
- [ ] Postcode, current
- [ ] ULN
- [ ] GUID
- [ ] Gender
- [ ] Ethnicity
- [ ] Status
- [ ] Enrolment number
- [ ] Reference number
- [ ] Curriculum area
- [ ] Institution
- [ ] Funding stream
- [ ] Special learning requirements
- [ ] Enrolment / induction date
- [ ] Target completion date
- [ ] Items on to-do list

Employer
- [ ] Name
- [ ] Address
- [ ] Postcode
- [ ] Country

Other roles
- [ ] Assessors
- [ ] IQAs
- [ ] EQAs
- [ ] Employers

GLH
- [ ] Required off the job
- [ ] Required on the job
- [ ] Required total
- [ ] Logged off the job
- [ ] Logged on the job
- [ ] Logged total
- [ ] Shortfall/ surplus

OTJ
- [ ] Hours required total
- [ ] Hours required to date
- [ ] Hours confirmed to date
- [ ] Hours not yet confirmed
- [ ] Hours surplus/shortfall to date
- [ ] Hours logged by assessors
- [ ] Hours logged by learner

Framework
- [ ] First qual start date
- [ ] Last qual end date
- [ ] On target?

Qualifications
- [ ] Title
- [ ] Assigned date
- [ ] Start date
- [ ] Target date
- [ ] Criteria total
- [ ] Criteria met
- [ ] Current completion %
- [ ] P/M/D score and grade
- [ ] On target?
- [ ] Assessor sign off date
- [ ] IQA sign off date
- [ ] Learner confirmation date
- [ ] Assigned unit credits
- [ ] Signed off unit credits
- [ ] Target completion % today

Units
- [ ] Title
- [ ] Target date
- [ ] Assessor sign off date
- [ ] IQA sign off date
- [ ] Current completion %

Assessment plans
- [ ] Number not signed off
- [ ] Number overdue
- [ ] Oldest overdue

Evidence
- [ ] Number of items
- [ ] Number awaiting assessment
- [ ] Oldest awaiting assessment
- [ ] Number awaiting action by learner
- [ ] Number sent for verification
- [ ] Number waiting for workplace training supervisor
- [ ] Last submission date

Learner activity logs
- [ ] Number of items
- [ ] Last date

Progress reviews
- [ ] Next date
- [ ] Last date
- [ ] Number overdue
- [ ] Oldest overdue

Logins
- [ ] Number
- [ ] First date
- [ ] Last date

The user can re-name this report, and edit it as they choose, adding and removing categories.

Data categories are displayed in 'blocks' of related data, for example OTJ hours, assigned qualifications or assessment plans.
Greyed out categories aren't available currently but will be added in a later phase of development.
If you have customised names in your organisation for the user roles and various data types, these custom names will pull through here, to avoid confusion.

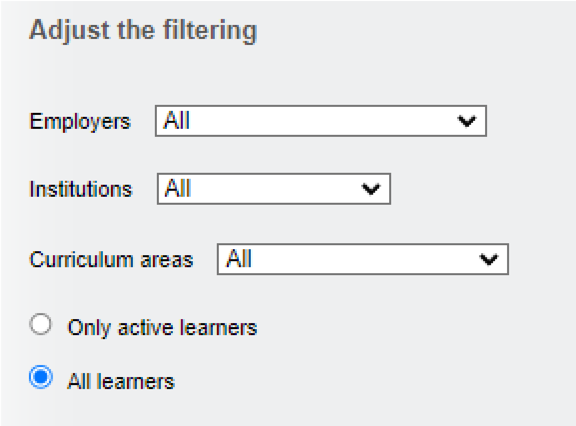
Once they have selected all the desired categories, the user can scroll down, and use 'drag and drop' to put the columns into the order they'd like.

Drag the column titles into the desired order

Surname | User ID | First name | DOB | Email

The report will be sorted by the data in the column furthest to the left, so if you place 'surname' there, the rows will be presented in alphabetical order by surname.

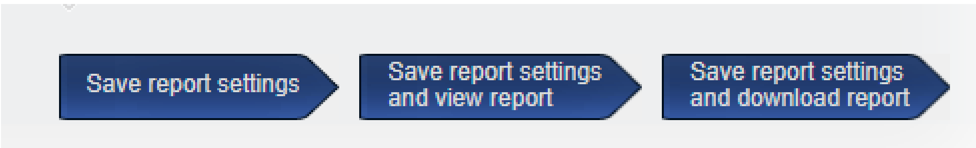
Lastly, they can set up the filtering they'd like for the report.



The report can be filtered to include all learners, or only active learners.

(If you are going to use the same report, but with different filter settings, for example to run the same report but for groups of learners with a different Employer, we would recommend that you set up the template once, and then just adjust the filtering each time you run the report.)

At the bottom of the screen, the user can select to save the report, or save the report and run it immediately. They can view the results on screen, or download of the data as a csv file.



Regardless of which option is selected here, the report will save so the same report can be run each week/month as required.

One thing to note, this function is based on learners. I.e. the starting point is learners and then their related data is added. It can't currently create reports based on other roles or other non-learner related data.