

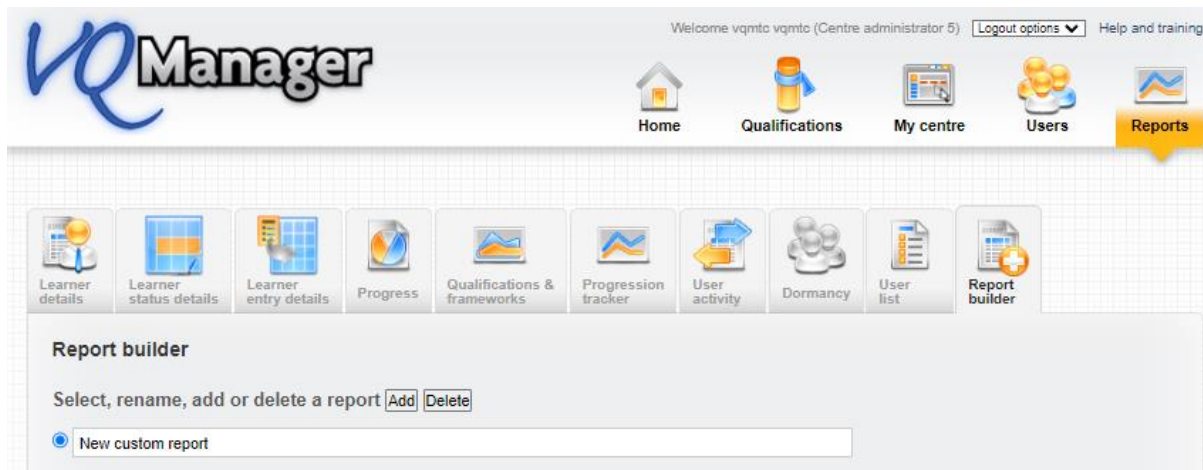
Bespoke Reporting

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.



The screenshot displays the VQ Manager interface. At the top left is the 'VQ Manager' logo. The top right shows a user greeting: 'Welcome vqmtc vqmtc (Centre administrator 5)', a 'Logout options' dropdown menu, and a 'Help and training' link. Below this is a navigation bar with icons for 'Home', 'Qualifications', 'My centre', 'Users', and 'Reports' (which is highlighted in yellow). A secondary row of icons includes 'Learner details', 'Learner status details', 'Learner entry details', 'Progress', 'Qualifications & frameworks', 'Progression tracker', 'User activity', 'Dormancy', 'User list', and 'Report builder'. The 'Report builder' section is expanded, showing the title 'Report builder' and the instruction 'Select, rename, add or delete a report' with 'Add' and 'Delete' buttons. A single report is listed: 'New custom report' with a radio button selected next to it.

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

- Employer name
- Employer address
- Employer postcode
- Employer country

Other roles

- Assessors
- IQAs
- EQAs
- Employers

GLH

- GLH required off the job
- GLH required on the job
- GLH required total
- GLH logged off the job
- GLH logged on the job
- GLH logged total
- GLH shortfall/ surplus

OTJ

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

Framework

- Framework first qual start date
- Framework last qual end date
- Framework learner on target?

Qualifications

- Qual title
- Qual assigned date
- Qual start date
- Qual target date
- Qual criteria total
- Qual criteria met
- Qual current completion %
- Qual P/M/D score and grade
- Qual on target?
- Qual assessor sign off date
- Qual IQA sign off date
- Qual learner confirmation date
- Qual assigned unit credits
- Qual signed off unit credits
- Qual target completion % today

Units

- Unit title
- Unit start date
- Unit end date
- Unit last submission date
- Unit sign off date

Assessment plans

- Assessment plans number not signed off
- Assessment plans number overdue
- Assessment plans oldest overdue

Evidence

- Evidence number of items
- Evidence number awaiting assessment
- Evidence oldest awaiting assessment
- Evidence number awaiting action by learner
- Evidence number sent for verification
- Evidence number waiting for workplace training supervisor

Learner activity logs

- Learner activity log number of items
- Learner activity log last date

Progress reviews

- Progress review next date
- Progress review last date
- Progress review number overdue
- Progress review oldest overdue

Logins

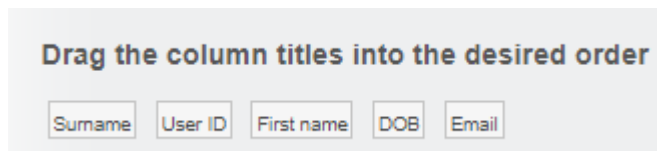
- Logins number
- Login first date
- Login last date

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.



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.

Adjust the filtering

Employers

Institutions

Curriculum areas

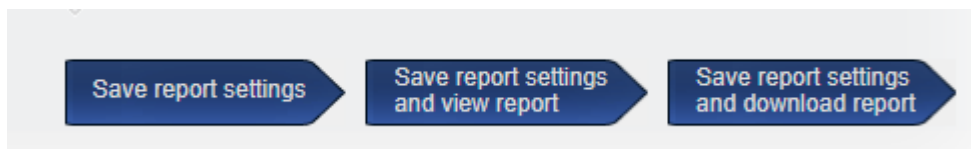
Only active learners

All learners

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.