INQUISIQ r3

Unleash the Power of e-Learning

Report Manual

Version 1.3

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Product Support

If you have purchased a support package and have any questions during the use of Inquisiq R3™ that are not addressed in this guide, please visit our support site at: http://support.icslearninggroup.com/

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Overview

This Inquisiq R3™ Report Manual explains the basics of creating and running reports in Inquisiq R3™. Procedures for selecting a report type, configuring the report to capture the correct data, and saving the report data and report settings are covered.

Running a Report

Granting Users Permission to Run Reports

To run a report you must have the correct permissions. A default user account will not have access to the reporting section of Inquisiq R3™. To grant a user access to the reporting functionality you must login as the **master administrator** and go to the ***Administrator Menu***. Within the *Users & Groups* sub-menu select ***Users***. Find the user in the user list (you can search for them with the search tool at the top of the page). Once you have located the user whose permissions you want to change, click the ***View*** icon on the right side of the list to view that user's account information. Once you are viewing the users account information you will see a set of Tools in the upper right part of the screen. Select the ***Permissions*** icon to view the permissions for the selected user.

The Permissions screen displays all of the permissions that are available, and indicates which ones have been granted to the user. To grant the user the ability to run reports, click the checkbox next to the **Reporter** permission located at the bottom of this screen. Also, note that the Reporter permission includes additional controls that allow you to select which types of reports can be run, as well as which users will appear in the reports. For example, you may want the User to have access to the *Course Transcripts* dataset but not the *Purchases* dataset. Likewise, you can control which users appear in the reports by restricting the users to only those in specific groups.

The Report Screen

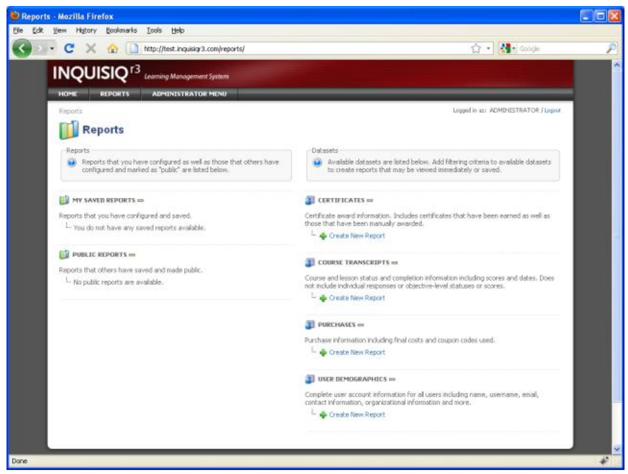
A user with the correct permissions will see the Report tab in the Inquisiq R3™ main menu along the top of the screen. If the Report tab is not visible to you, then you do not have the correct permissions. To run a report, click the Report tab to access the Report screen.

The Report screen consists of two areas. The area on the left provides you quick access to all previously saved reports. Notice that the saved reports are divided into two categories, the ones on top are the reports that you created and saved, and the ones below, are reports that other people have saved and made public. The area on the right of the report screen shows the Datasets that are currently available to you for your reports. Within each dataset you will also notice any reports that you have created and saved using that dataset as well as an option to *Create a New Report*.

Creating a New Report

To create a new report, you first select which *dataset* is most appropriate for your needs. Each dataset contains different information, although a lot of information can be found in more than one dataset (for example, most common User information is in all the datasets). Four datasets have been created for you and come standard with Inquisiq R3™. They are the *Certificate, Course Transcripts, Purchases*, and *User Demographics* datasets.

- **Certificate dataset**: contains information related to certificates that have been granted. This includes information like User information, Certificate name, award date, expiration date, credits, etc.



- **Course Transcripts dataset**: includes all information and status related to the course enrollments. It will include data related to course completions, lesson completions, lesson scores, interaction data (quiz questions), and all objective data.
- **Purchases dataset**: contains information related to course purchases such as order number, purchase amounts, purchase dates, and coupon code information.
- **User Demographics dataset**: contains only profile information for all user accounts. Note that this information is also in the other datasets, however in the User Demographic dataset it is isolated. This dataset would allow you to run reports that are essentially user lists that can be filtered for specific criteria. For example, you could generate a list of all users that are in a certain user group, department, division, or state.

Note that the Purchases dataset is only enabled when e-commerce has been enabled and a payment processor (other than PayPal) has been set-up and verified. When choosing PayPal as a payment processor, the Purchases dataset will not be enabled because the methods PayPal uses to confirm transactions cannot be tracked in real-time. Reporting on purchases processed by PayPal must be done through PayPal.

Note that it is possible to create additional datasets if you find it necessary. This can be done by the administrator with assistance from ICS technical staff. Contact ICS technical support team for additional information on how to create and load new datasets.

Once you have decided which dataset is most appropriate for the information you are looking for, click the ***Create New Report*** link for that dataset to take you to the report configuration screen.

Configuring a Report

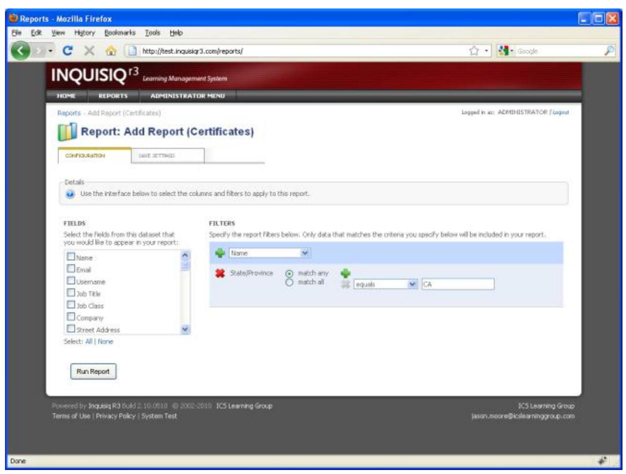
Select the Report Data Fields

The Report Configuration screen has two components to it. The first, located on the left, provides you with a scrollable list of all the data fields available within the dataset you selected. Click the checkbox next to any data field that you want included in your report.

Setting up Filters

The second component to a report is the Filters. The Filters are located on the left side of the screen and allow you to refine what data is included in your report. A filter is basically a logical criteria or rule that is applied to all the potential records in a report and decides which one to include. If a record does not meet the filter criteria, then it is *filtered* out of the report. Filters essentially consist of three elements:

- The first element is the input field to be tested (note that this can be any field in the dataset, even those that have not been selected for display in the report).
- The second element is the logical operator such as *equals*, contains, or *starts with* (available operators are selected from the pull-down list). Note that the logical operators that are available will potentially be different depending on what data field was selected. This is especially true if the selected data field is a date. Dates will include many options including relative dates such as "this month" or "last month".
- The third element is the operand or specific value that will be used in the filter operation.



Example #1

Let's walk through the steps that would be necessary to create a filter that would produces a report of people that live only in CA. To do this you would first add a filter that is based on the field of **State/Province**, use the logical operator of **equals***,* and set the test value to **CA**.
To illustrate the process, follow the steps below to create the filter on State/Province being equal to CA:

1. Under the Filters section of the Report Configuration screen, select the **State/Province** field from the pull-down list of all possible data fields. Once you do this, State/Province will appear in the filter box. Now, to add or apply this

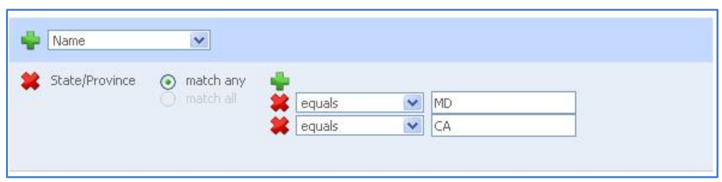
filter, click the **green plus sign** next to it. When the green plus sign is clicked, you will notice that the State/Province filter now appears in a list of filters below. To remove any filter from the list, click the red X next to it.

2. Next, we need to configure the logical operator you want to use. The options are in the pull-down list and include *Contains, Equals, Does not contain, Does not equal, and Starts with.* (Note that the options that appear in this list will be dependent on the type of data you are filtering). In our example, we are trying to find people who live in the state of CA so we will use the criteria of "**Equals**".
3. The final step is to specify the test value by entering in **CA** in the open box.

Example #2

To add a little more complexity, let's say we want to expand the report to include people in MD as well as CA. To do this, you will expand the filter that has already been setup in example #1 by adding another line (logical test) to the filter. Follow these steps to add MD as an additional test:

4. Click the green plus to add another test to the State/Province filter. (To do this, do not click the green plus sign on the left of the top line – doing that would add another filter. Instead, click the green plus sign that is on the same line as the State/Province filter that we are editing.)
5. On the new line that was added to this filter, select the logical operator you want. Again, we will select **equals** from the pull-down list.
6. Specify MD by typing **MD** into the test value field.
7. Notice that in the middle of the filter expression you will generally have the option to select either "match any" or "match all". This allows you to change the way the filter works when you have multiple criteria. However, in this example, you will only have the option for "match any". The reason for this is that we selected "Equals" as the logical operator, and the system knows that you cannot have a situation where State is simultaneously equal to more than one thing. For example, a User either lives in CA or MD but not both. The system then forces this setting to be "match any" – which means that ANY of the lines in this filter can be true for the filter criteria to be met. To illustrate this point, change the logical operator from "Equals" to "starts with" and notice that the "match any" option is now available. So it we wanted the filter criteria to be true for any user who lives in a State/Province that Start with the letter C, we would set the logical criteria to "Starts with", and then type in the letter "C" into the test value field. In this case, you could have several matches (CA, CT, CN, etc).



Example #3

To help further explain the concepts behind report configuration let's do another slightly more complex example. In this example we will create a report that displays the name and email for any user who has completed a course in the 4th quarter of 2009. We will also display the name of the completed course and the date it was completed on.

Steps:

1. Go to the Report Screen by selecting the **Report** tab from the top menu.
2. Since you are looking for information about Courses, click the **Create New Report** link in the Course Transcript Dataset.
3. Select which fields you want displayed in your report. In this example, you will click the check box next to the **Name, Email, Course, and Data Completed** fields.
4. Next we need to setup a filter that will restrict records to only cases where the data field of "Course Status" is equal to "Completed". To do this:
    a. From the filter pull-down list, select **Course Status**. Then click the **green plus** to add this criteria to the filter.
    b. Now that you have added a filter criteria, you need to set the filters logical operator by using the pull-down to select "**Equals**". (In this case, you will notice that the test value then provides a pull-down with the possible values that Course Status could be equal to). Select the **Completed** option from the pull-down.

5. Next, we setup a second filter that will specify the desired date range of greater then October 2009 **and** less then December 2009. To do this:
    a. Select "**Date Completed**" field from the filter field pull-down list. Click the **green plus** next to it to add this as a new filter criteria.
    b. Select the Operator of "**is greater than**". Specify a test value of "**2009-10-01**" by typing it into the text field to the right of the logical operator or click the calendar icon and select the date from the calendar.
    c. Now to add another test on the "date completed" filter, click on the **green plus** symbol in the Date Completed filter. This will add another line immediately above the first criteria on Date Completed.
    d. This time select the Operator of "**is less than**". Specify a test value of "**2010-01-01**" by typing it into the text filed to the right of the logical operator or click the calendar icon and select the date from the calendar.
    e. Note: make sure that the "**Match All**" rule has been selected so that you are getting dates that are **both** greater than 2009-10-01 **AND** less than 2010-01-01. If you were to leave it set to "**Match Any**" then you will get all dates that match any of the stated criteria. In other words the match

would now be true for any date that is greater than 2009-10-01 **OR** less than 2010-01-01 (which is all dates).

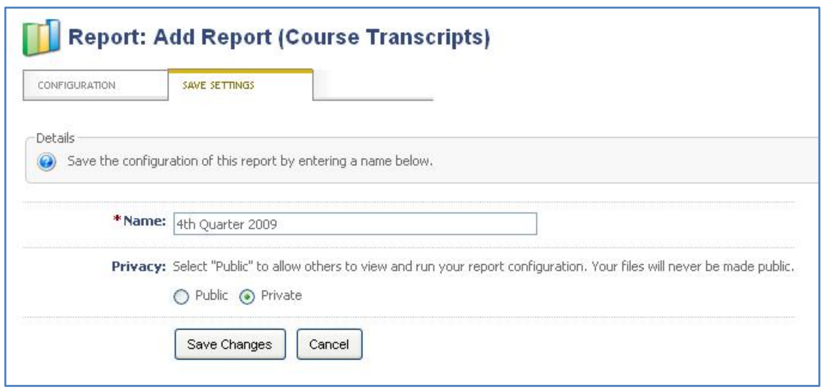
Running your Report

Once you have configured your report, as described in the previous section, you can click the Run Report button at the bottom of the report screen. When you run the report, a new window will open. Initially, you will see an animated icon that says “generating report “. When the report is finished generating, the Run Report window will display two options:

1. You can view the report results as an HTML page.
2. You can open/save the report results in Excel.

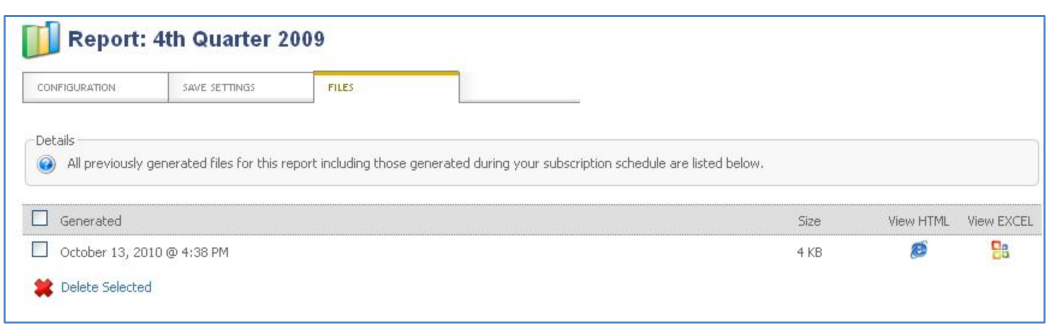
Saving your Report Settings

To save a report configuration, click on the **Save Setting** tab at the top of the report screen. You will be prompted to enter a name for your report and to specify if you would like your report to be “Public” or “Private”. If you make it public, other people who have reporting permissions will see your report and be able to run it. If you make the report private, then only you will be able to see it and run it. Note that once you name the report and save it, a new tab will appear called Files. This tab is where you can access the data that was generated by the report and saves. Note that these files contain the specific data for when the report was run and is therefore fixed. You would have to rerun the report if you want to see updated information.



Saving your Report Data

After you run the report, you will be giving the opportunity to view it as an HTML page or to open/save it in Excel. However, if you have already saved the report configuration (as described in the above section), then you are also given the option to “Save” it. Selecting this option will save a copy of the report data (in the report you just ran) so that you can retrieve it at a later time. To access the saved report data for this report, you will select the “**Files**” tab at the top of the report screen. This will show you a list of all the report data files that have been generated and saved (for this report). The date



that the report data was generated is displayed in the list. There are also icons on the right side that allow you to view the report data as either an HTML page on in Excel. You can also delete the report data by selecting it (click the check box on the left) and then clicking the “**Deleted Selected**” at the bottom of the screen.