The Custom Report feature allows users to select specific data sources (such as timesheet data, student data), customize the format and content of reports, and manage those reports within a dedicated section of the Learning Activities module. The feature is designed to empower users, particularly admins, to generate the specific reports they need without relying on predefined, canned reports. The goal is to provide greater flexibility and autonomy in reporting, addressing common requests for custom reports across different system modules.

- 1. Navigate to the Learning Activities section from your dashboard. Alternatively, you can click on the upper left-hand hamburger icon and select the Learning Activities option.
- 2. In the Learning Activities section, click on the Reports option in the left-hand menu.

⊟ Learning Activity			600 600	P. ?	모) Chat	<b>F</b>	🛞 Ask Leo	Anamika Singh	Exxat Sales (Physica	l Therapy)
Click a learning activity name to review it for a course										
Reports	Course numbe	r 🔹 Q Searc	h							$\nabla$
ps Results found: 280										
Class of 2021*	COURSE NUMBER	COURSE	LEARNING ACTIVITIES		ACADEMIC YEAR	TERM	COHORT	PROFESSIONAL YEAR	CAMPUS	ACTION
Class of 2022*     Class of 2023	000	Site survey	Forms/Evaluations Patient Times	heet Time Off	2023 - 2024	Fall	Class of 2021*	2nd Year		Set R up R

3. Under the Standard tab, you will see reports configured for you by the Exxat team. Click on the Custom tab to access your custom reports.

	Standard	Custom PUUS 🛧 Favorites	PLUS + Create New Report
Q s	iearch		
28 Res	sults Found		
	CATEGORY	REPORT	DESCRIPTION
☆	Forms/Evaluations	Raw Data Report for Non Placement Forms	View all responses to any evaluation/form that is not placement based for selected course(s)
☆	Forms/Evaluations	Raw Data Report for Non Placement Forms New Exxat Internal	View all responses to any non-placement based evaluation/form for selected rotation(s)
☆	Forms/Evaluations	Total Qualifications of CIs (Standard 2024 4P/2016 4O)	This report pulls from the CI Details form and provides statistics on all clinical instructors paired with students during the selected clinical experiences.
☆	Patient Log	Aggregate Log Count	View count of patient log submitted for each student across multiple rotations
☆	Patient Log	Aggregate Raw Data	View patient log statistics for each student across multiple rotations

4. If you've configured any custom reports in the past, they will appear in the list here. To configure a new custom report, click on the Create New Report button.

	Standard	Custom PLUS 🔶 Favorites				ate New Report
6 Resu	6 Results Found					
	CATEGORY	REPORT	DESCRIPTION	CREATED BY	UPDATED BY	ACTIONS
☆	Timesheet	Clinical Hours By Student By Course in 2024	Clinical Hours By Student By Course in 2024			0 💼
☆	Student	Actionables for 2022 Class	List of students with pending docs or interventions needing attention or review			0 🛍
☆	Timesheet	Hours 2024	Student hours by course & setting during 2024			0 🛍
☆	Student	My Student Watchlist	Open actions per student			0 🖻

5. Select the Data Source for which you'd like to run the custom report. You can either run this custom report one time to obtain the data you need, or you can save it for future use.

(Within each data source card, you can view the title of the data source, a short description, and a status box in the upper right-hand corner indicating the refresh frequency. If you select a live data source, reports running using this data source will always be up to date as the data is refreshed continuously. If you select data refreshed once every 24 hours. This means that student information that has been changed in the last 24 hours may not be reflected within the report until the following day.)

← Select a Data Source	
Data Refreshed Every 24           Hrs           Access the student's demographic details, contact information, and an overview of their compliance document status, interventions, communications, placements, and learning activities.	Timesheet Live Data Refresh Find all the records of the time sheets that have been filled by the students of your program during their placements.

6. Click on timesheet tab to run a report related to timesheet.



7. If you select a different data source, the configuration options may change.



8. To rename the report, click on the pencil icon in the upper left-hand corner of the page.



9. A drawer will open enter a new name for the report in the Add Report Name text box and provide a description in the Add Description text. Once you are done, click on the Save button.

$\times$ Clinical Hours By St	udent By Course in 20	24 Save
Add Report Name *		
Clinical Hours By Student B	By Course in 2024	
Add Description *		
Clinical Hours By Stude	nt By Course in 2024	i.
		ti -

10. Now we can choose between two types of reports: Raw Data Reports or Pivot Reports.



11. In the raw data report section, you can customize the columns that appear in the report. To delete a column, click on the x icon next to the column name. To add a new column, click on the

"Add New" option.

<b>Basic Filters</b>	
Raw Data Report O Pivot Report i	Add Data Points
E Data Points See Advanced Filters	<ul> <li>Student Information</li> <li>Student ID</li> </ul>
Selected Data Points	<ul> <li>Student Last Name</li> <li>Student First Name</li> </ul>
(+) Add new	Student Name
Student Last Name   ×	Student Email
🗱 Student First Name 🛛 🗙	Placement Information
💱 Student Email X	<ul> <li>Clinical Experience</li> <li>Clinical Experience Start Date</li> </ul>

12. To change the order of the columns, use the double ellipses icon (three dots) next to the column name. Drag and drop the column to reorder.

000	Student Last Name	×
000	Student First Name	×
000	Student Email	×

13. To filter the report with advanced options, click on the Advanced Filters tab and click on "Add New". Configure filters for the available fields

Basic Filters	
	Add Filters
Raw Data Report O Pivot Report i	Student Information
i ⊇ Data Points 🔁 Advanced Filters	Placement Information
	Clinical Experience Start Date
+ Add new	Clinical Experience End Date

- 14. Next click on Custom to create custom filter. Select an Operator and Value. For example, if you want only Direct Patient Care entries:
  - 1. Select Equals as the operator.
  - 2. Enter Direct Patient Care in the value box.

📃 Data Points	See Advanced Filters		(+) Add new Starts With
(+) Add new			Ends With
Sectors Category	^	×	Contains
Select			Equals
Equals	Direct F	Ð	Not Equals to
		-	Student Email

15. You can also apply basic filters, for example to filter by Student and Course, select the specific student and course. Click on the Basic Filters Accordion to view available filters. After configuring filters, click the Apply button.

√ Basic Filters 2				✓
V Basic Filters 2				^
Cohort BSN Students*, Advanced Practice/ 👻	Academic Year	Professional Year	Term	Course
Rotations	Program clinical settings	Locations	Sites	Students -
				Reset All Apply

16. Once the filters are applied, click the run button to generate the report. To export the report for offline access, click the Export Icon. Also, to save the report for future use, click Save and Run.

			<b>Run</b> Save and Run
			~
Preview			
STUDENT NAME	PROGRAM CLINICAL SETTINGS	GRAD COURSE 1 (FNP LOG, ALL FORMS,TIMESHEET)*	PRE-DNP CLINICAL HOURS (TIMESHEETS)*
Lonez Logan	Eamily Medicine	SUM OF DURATION (HH:MM)	SUM OF DURATION (HH:MM) 34-30
Barrett, Donte(Grad)*	Acute Care	07:08	00:00
	Family Medicine	06:00	00:00