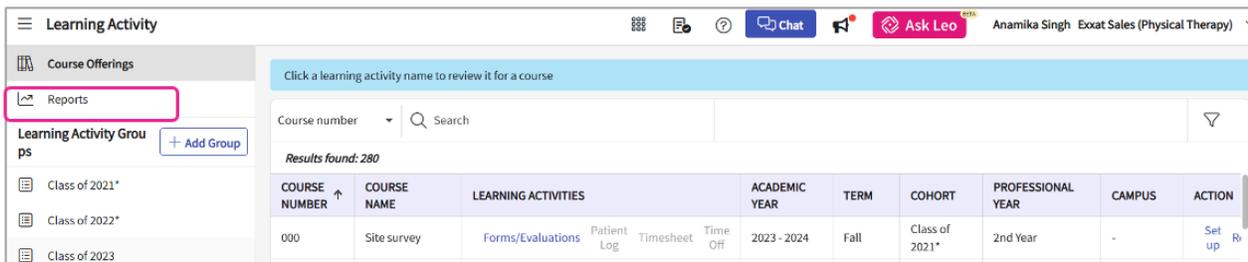
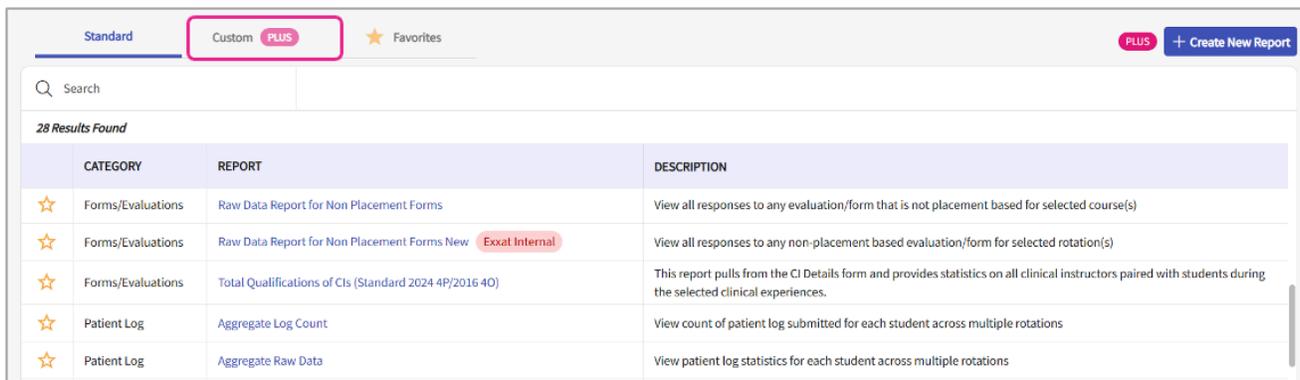


The Custom Report feature allows users to select specific data sources (such as timesheet data, student data), customize the format and content of reports, and manage those reports within a dedicated section of the Learning Activities module. The feature is designed to empower users, particularly admins, 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.

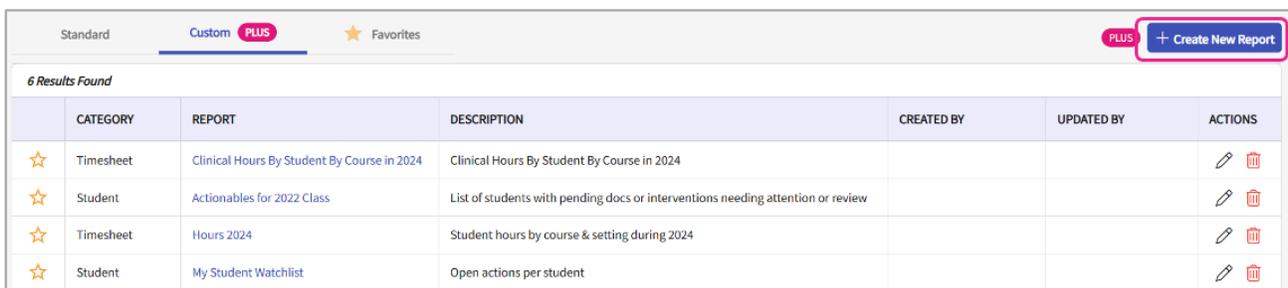
1. Navigate to the Learning Activities section from your dashboard. Alternatively, you can click on the upper left-hand hamburger icon and select the Learning Activities option.
2. In the Learning Activities section, click on the Reports option in the left-hand menu.



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.

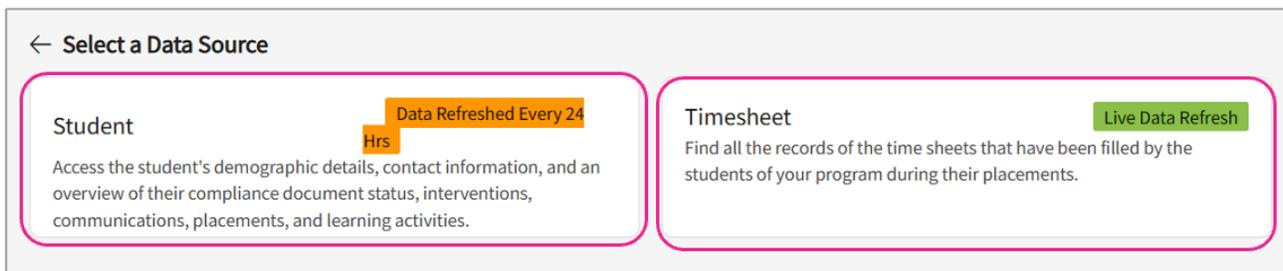


4. If you've configured any custom reports in the past, they will appear in the list here. To configure a new custom report, click on the Create New Report button.

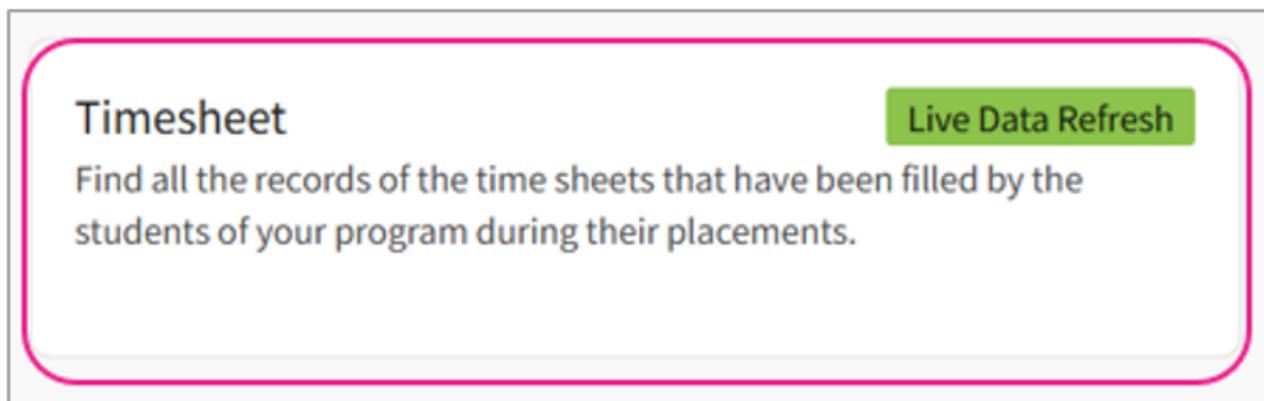


5. Select the Data Source for which you'd like to run the custom report. You can either run this custom report one time to obtain the data you need, or you can save it for future use.

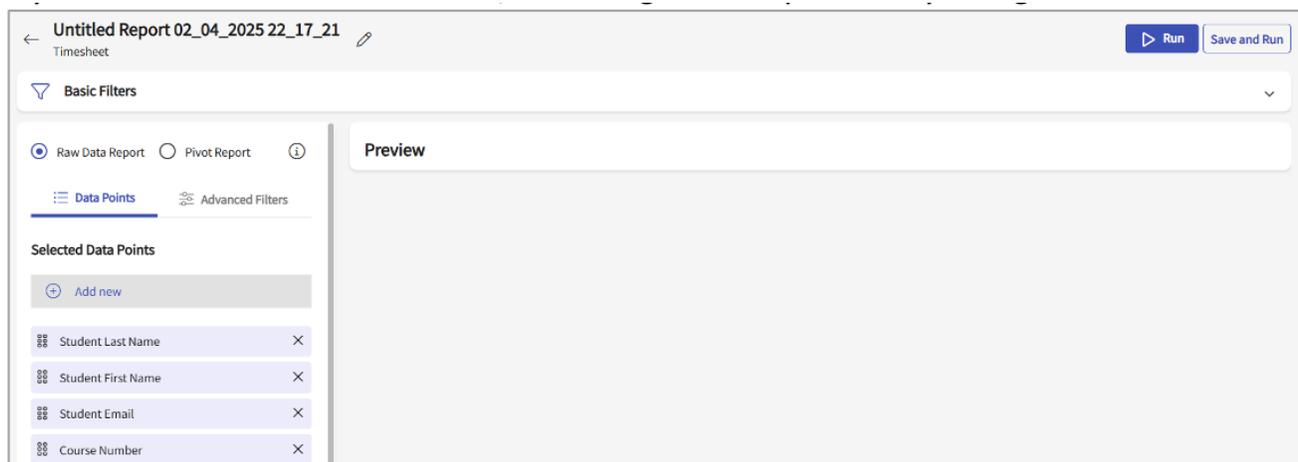
(Within each data source card, you can view the title of the data source, a short description, and a status box in the upper right-hand corner indicating the refresh frequency. If you select a live data source, reports running using this data source will always be up to date as the data is refreshed 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.)



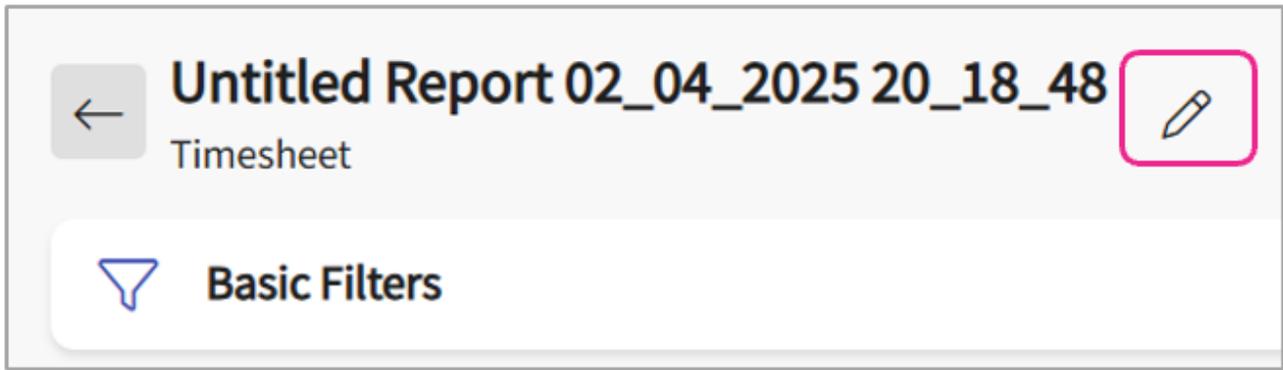
6. Click on timesheet tab to run a report related to timesheet.



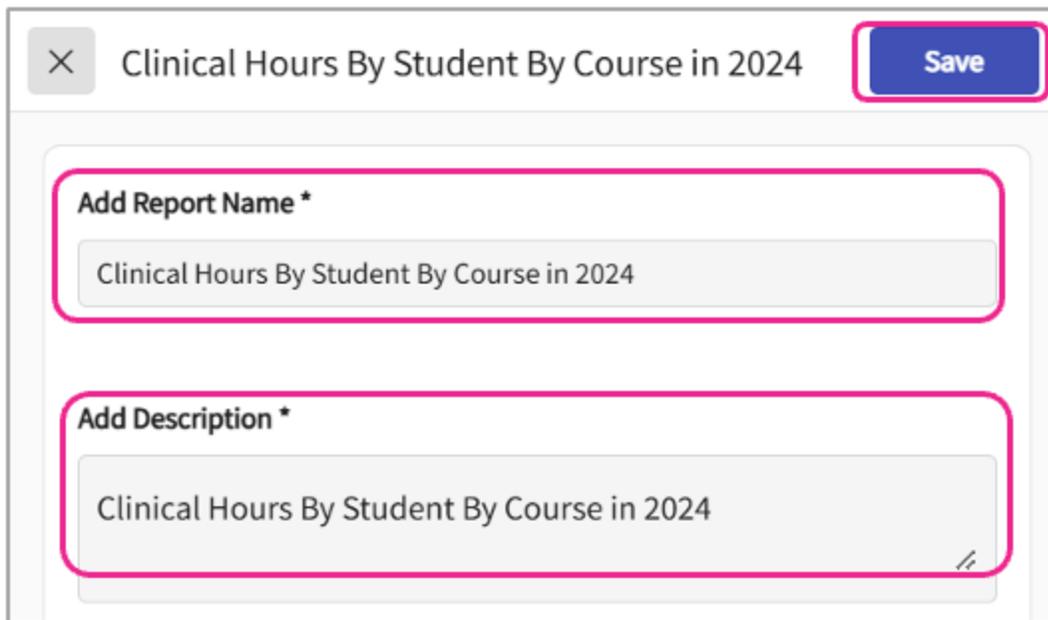
7. If you select a different data source, the configuration options may change.



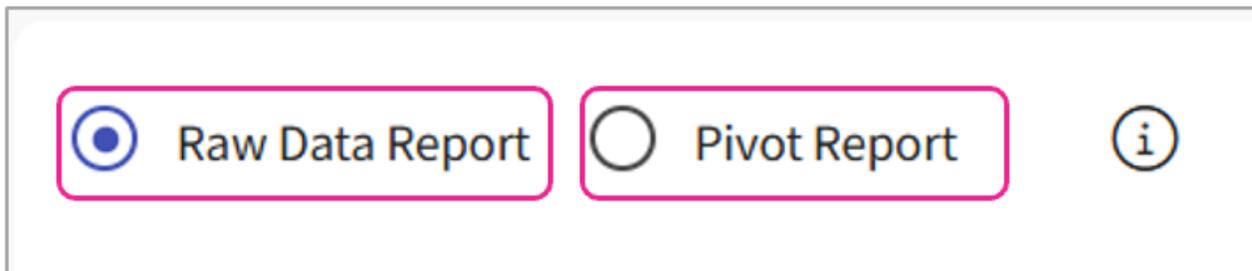
8. To rename the report, click on the pencil icon in the upper left-hand corner of the page.



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.

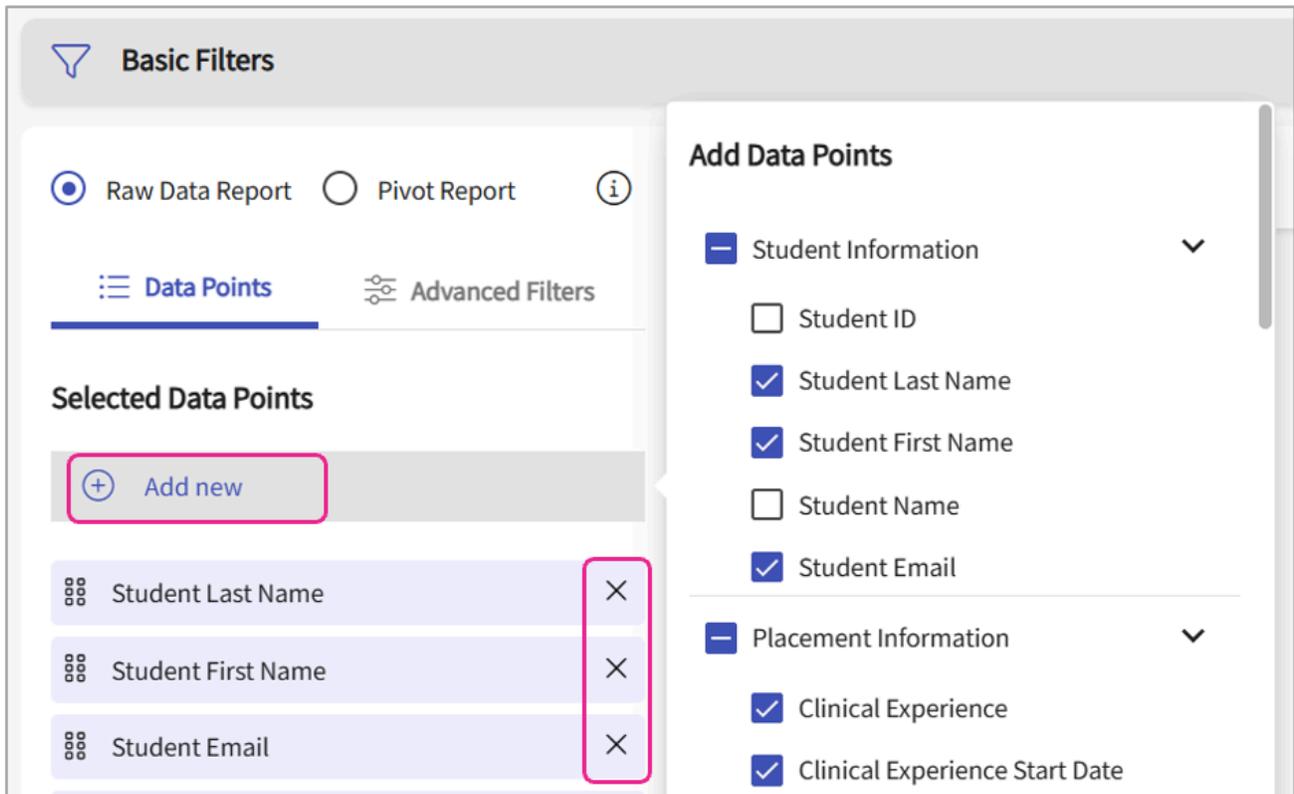


10. Now we can choose between two types of reports: Raw Data Reports or Pivot Reports.

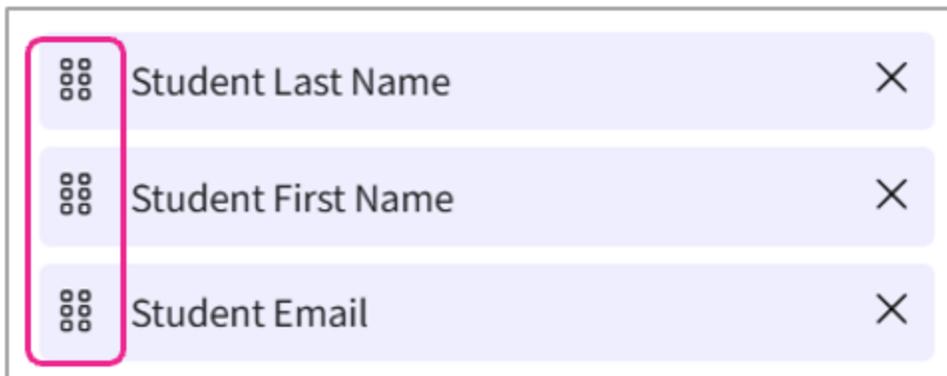


11. In the raw data report section, you can customize the columns that appear in the report. To delete a column, click on the x icon next to the column name. To add a new column, click on the

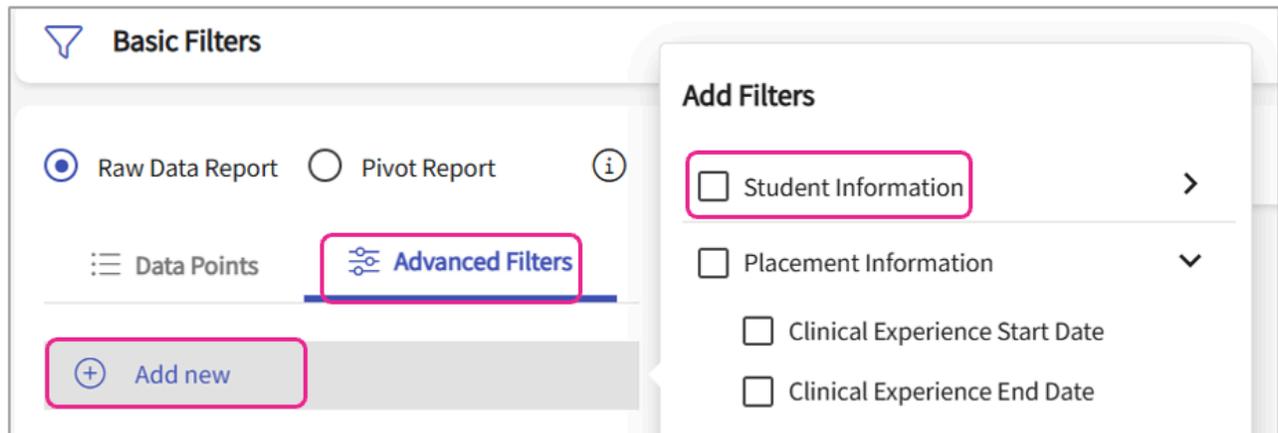
"Add New" option.



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.

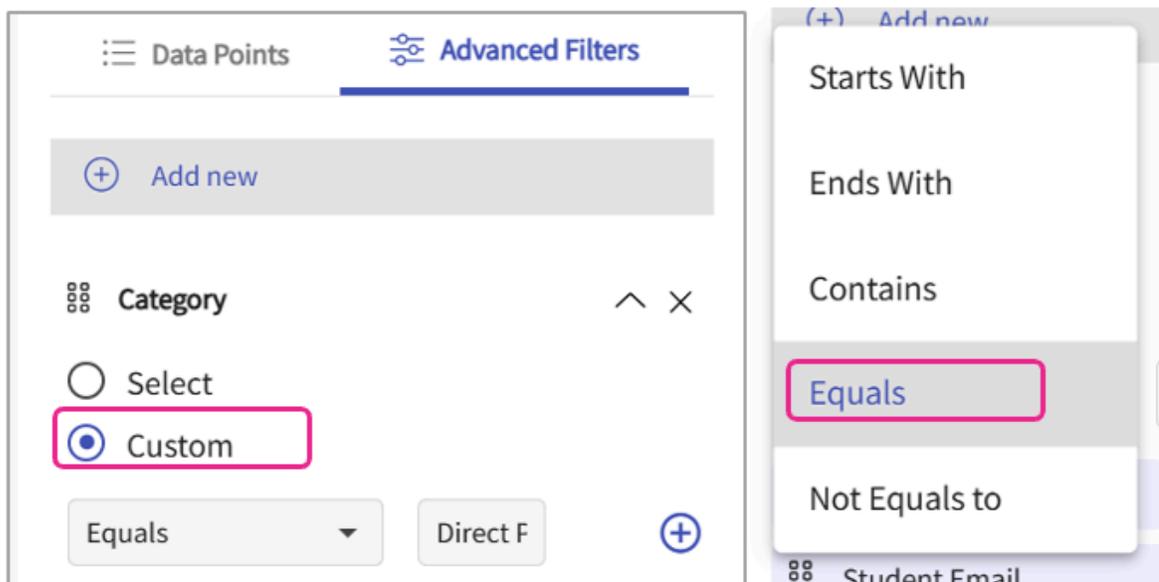


13. To filter the report with advanced options, click on the Advanced Filters tab and click on "Add New". Configure filters for the available fields



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.



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

Basic Filters 2

Cohort: BSN Students*, Advanced Practice/...

Academic Year: [Dropdown]

Professional Year: [Dropdown]

Term: [Dropdown]

Course: Anesthesiology (Curriculum Mappi...)

Rotations: [Dropdown]

Program clinical settings: [Dropdown]

Locations: [Dropdown]

Sites: [Dropdown]

Students: [Dropdown]

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.

Run Save and Run

Preview

STUDENT NAME	PROGRAM CLINICAL SETTINGS	GRAD COURSE 1 (FNP LOG, ALL FORMS,TIMESHEET)* SUM OF DURATION (HH:MM)	PRE-DNP CLINICAL HOURS (TIMESHEETS)* SUM OF DURATION (HH:MM)
Lopez, Logan	Family Medicine	00:00	34:30
Barrett, Donte(Grad)*	Acute Care	07:08	00:00
	Family Medicine	06:00	00:00

Export Icon