Custom Reports

Contents

Overview

Administrative users can set up and run custom reports on users within their agency. There are several types of custom reports available, with each type dictating what information can be gathered on the report – for example, Transcript Reports are used to find details on users' transcript items, Performance Review Reports are used to check the status on performance evaluations, Goals Reports can get information on users' goals and job duties, et cetera.

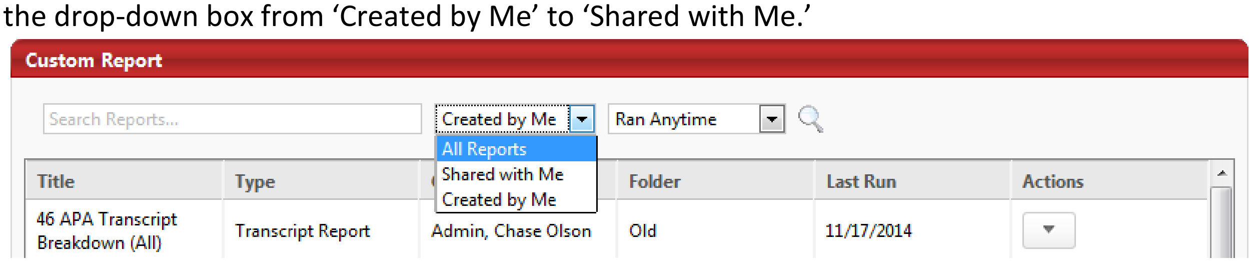
In this guide we'll look at creating a custom report and accessing a report that was shared with you.

Accessing a Shared Report

Reports can be shared with other users – when you receive a shared report, you are only able to view and run the report. If you would like to make edits to the report, you'll need to make your own copy first.

1. Access the custom reports page by going into the Reports menu, then clicking Custom Reports.

2. Initially the custom reports page will show you only reports you have created or made copies of. Change the drop-down box from 'Created by Me' to 'Shared with Me.'



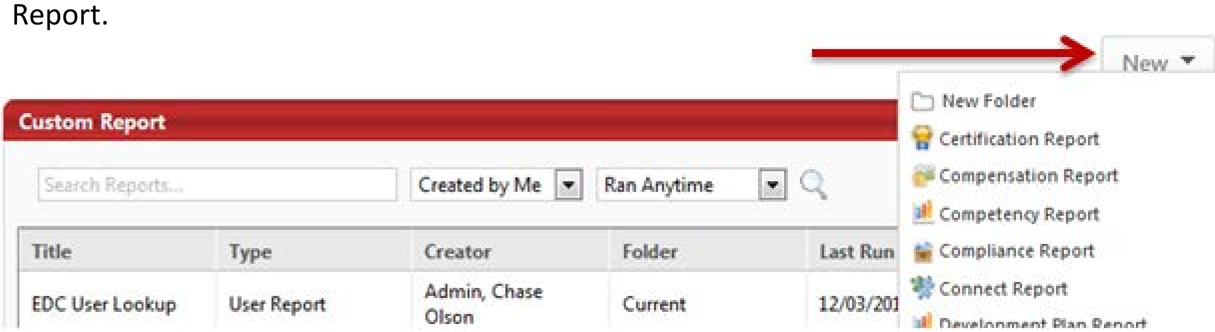
3. The system will now only show reports that have been shared with you. You can use the search box to look for a specific report – once you've found the report you're looking for, click the Actions button ( ) to show a list of available actions:
    - **Excel – This will let you download a spreadsheet copy of the report.**
    - **Print – This will load the report in your web browser in a printer-friendly format.**
    - **Text – This will download a raw text file with the data from the report.**
    - **History – This will let you download previous versions of the report.**
    - **Copy – This will create a copy of the report – useful for when a report is shared with you and you want to copy it so you can make your own edits to it.**
    - **Refresh – This will force the report to run again.**

If you select the Copy action, it will load the report and allow you to save a personal copy so you can make changes to the report – see the first section of this guide for more on setting up custom reports.

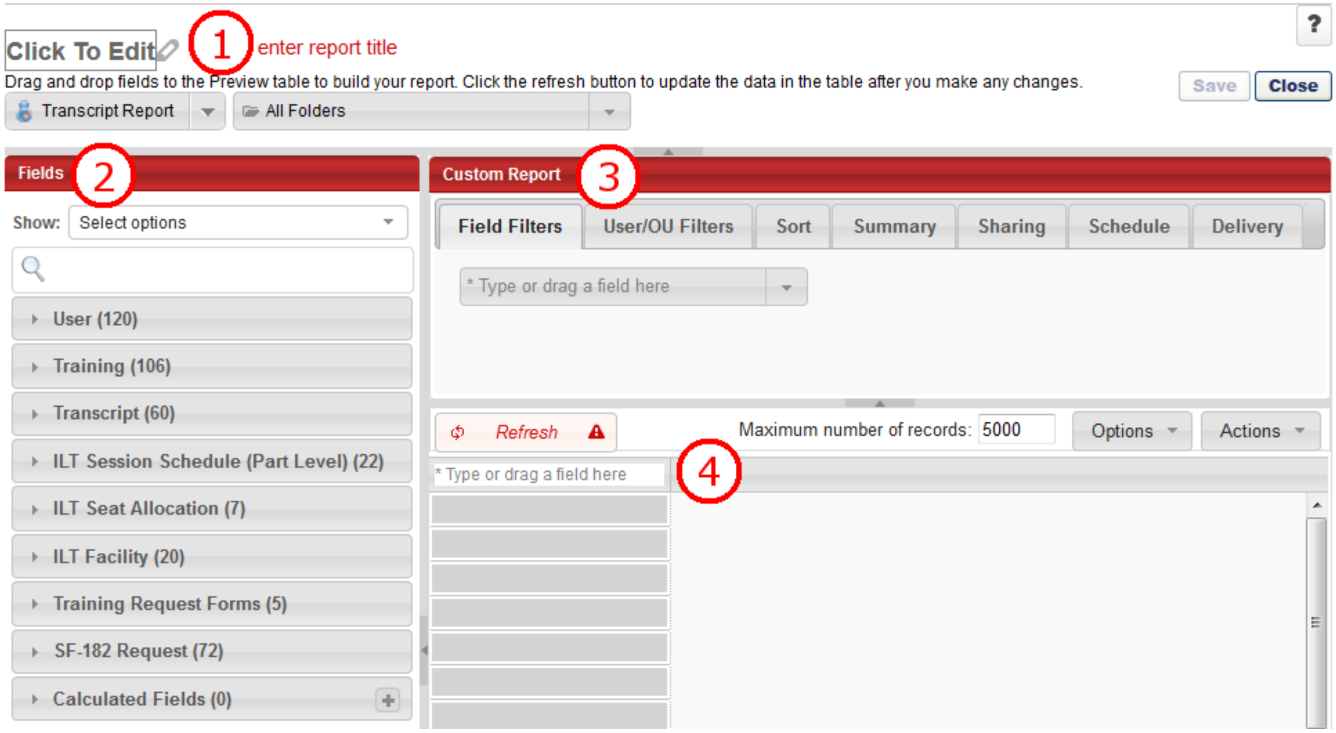
Create a New Custom Report

1. Access the custom reports page by going into the Reports menu, then clicking Custom Reports.

2. This will take you to a page where you can see a list of your custom reports. Click the New button, then select a report type to create a new custom report. For this guide, we'll look at creating a Transcript Report.

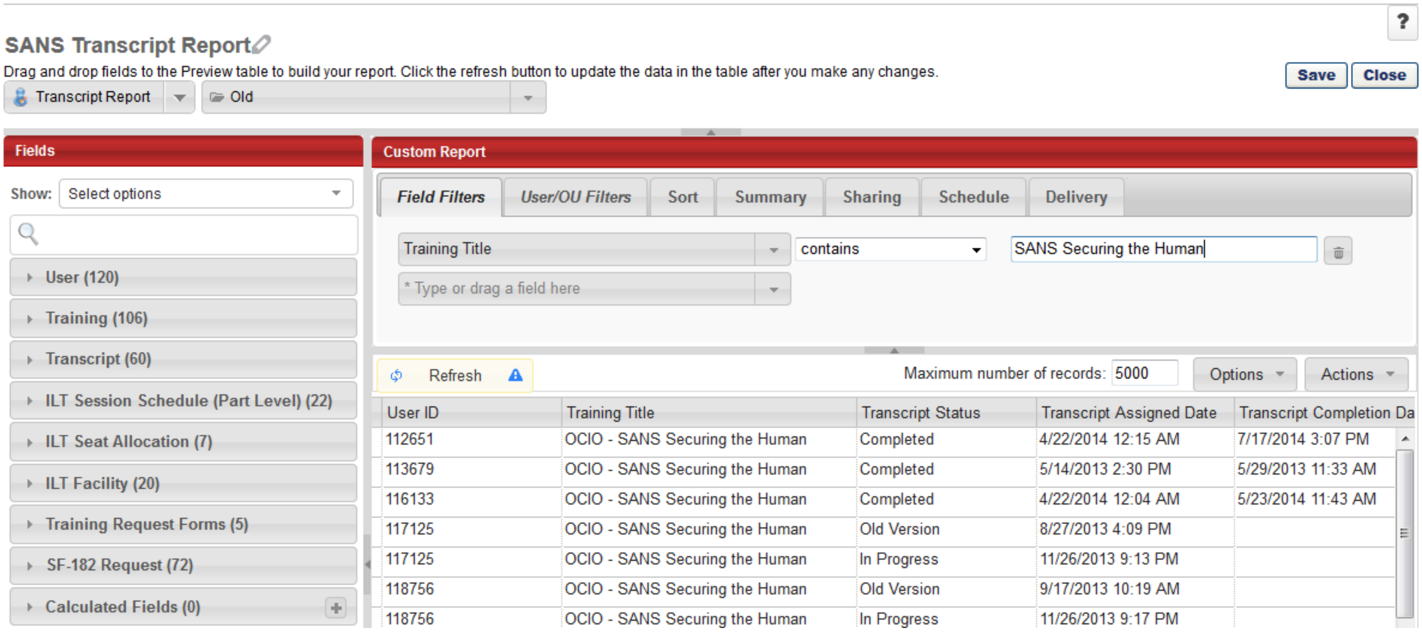


3. After selecting a report type, you'll be taken to the main report building page. There are several items of note here:



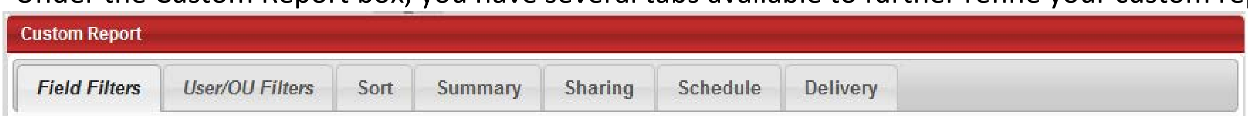
- **(1) Report title – click the text to enter a title for this report.**
- **(2) Fields – this is a list containing all the fields you can add to your custom report. You can use the search box to find what field you're looking for, for example type "Name" to only display fields that deal with names (such as employee name, name of their manager, etc). You can single-click a field to quickly add it to the report.**
- **(3) Custom Report settings – this area contains options and settings you can use to determine what information shows up on the report – see step four for more details.**
- **(4) This is a preview of what the report that will generate. You can also rearrange the fields here by clicking and dragging the column header, choose to sort by single-clicking a column header, and choose the default width of the columns. You can click the "Refresh" button to reload the first 50 records generated by the report.**

Here’s an example of a custom report that has been set up:



Here we’ve set up the report to find only training items that contain “SANS Securing the Human” in the title. We’ve added several fields, such as transcript status, to find out if users have completed this training or not.

4. Under the Custom Report box, you have several tabs available to further refine your custom report:



- **Field Filters – here you can filter records based on the data in the report. You can click and drag a field from the left, or type one in the box. For example, enter “Training Title” to find details only on a specific course.**
- **The User/OU Filters tab lets you include only certain users in the report. You can narrow the report down by agency using this filter – select Agency from the drop down menu, then click the box icon ( ) to the right to select an agency.**
- **The Sort tab lets you choose the default sorting order for your report. You can choose from any of the fields added to the report – you can also simply click the column header in the report preview to sort by that column (note that you’ll need to refresh the preview to sort the report).**
- **The Summary tab will let you group records together in the report – for example, you can summarize by User ID to group all records from the same user together.**
- **The Sharing tab lets you select other users to share the report with. Shared reports will show up on the Custom Reports page.**
- **The Schedule tab lets you schedule the report to be run automatically. Larger reports can take a little while to run.**
- **The Delivery tab will let you have the report e-mailed to you every time it gets run.**

5. When you're finished building your custom report, click the Save button on the top-right, then click the Close button to go back to your list of reports. Your report will run automatically after closing; under the Last Run column next to your report it will read "Processing…"

Title	Type	Creator	Folder	Last Run	Actions
SANS Transcript Report	Transcript Report	Admin, Chase Olson	Old	Processing...	▼

6. Once processed, the Last Run will display when the report last ran. Click the button in the Actions column (▼) to download the report, make copies, and perform other actions:
   - **Excel – This will let you download a spreadsheet copy of the report.**
   - **Print – This will load the report in your web browser in a printer-friendly format.**
   - **Text – This will download a raw text file with the data from the report.**
   - **History – This will let you download previous versions of the report.**
   - **Edit – This will load the report so you can make changes to it.**
   - **Copy – This will create a copy of the report – useful for when a report is shared with you and you want to copy it so you can make your own edits to it.**
   - **Refresh – This will force the report to run again.**
   - **Delete – This option will remove the report from your list.**

   Note that not all actions are available for reports that were shared – creating a personal copy of shared reports via the Copy option will allow changes to be made.

LINK Help Desk Contact Information

If you have questions regarding the performance review process or need your logon info, please contact the LINK help desk. The LINK Help Desk provides assistance for the following programs:

- The Employee Work Center
- The Employee Development Center
- The Recruitment & Selection Center

Email: as.linkhelp@nebraska.gov

Phone: 402.471.6234