



**Report builder – Overview  
(Client documentation)**

**V.2**

# Table of Contents

---

[Table of Contents](#)

[Summary](#)

[Getting started](#)

[General settings](#)

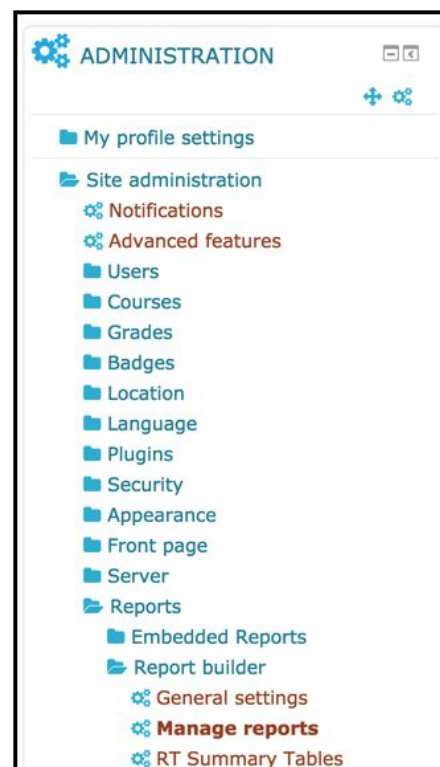
## Summary

---

The Refined Data Solutions report builder provides the ability to create and edit reports based on a specified data source in the LMS. The **data source** is the type or types of data the system uses to build a report. For example, the active users report (which shows the number of active users per month) uses the 'active users data source' to collect information about the number of active users in the system to display on the report.

There are two types of reports in the report builder: user generated reports and embedded reports. **User generated reports** are built by users in the system who have permission and access to the report builder. **Embedded reports** are built by Refined Data Solutions and are automatically accessible by the site administrator upon installation of the report builder.

Any user who builds a user generated report can view the report and can share viewability with other users. Embedded reports can only be seen by site administrators. Additional features include the **My Reports block**, which provides users the ability to view a report. Reports can also be scheduled to automatically build themselves and be emailed to a defined user monthly, weekly, or daily.



## Getting started

---

The report builder is automatically installed on the Refined Training platform with the release of version 3.2 in April 2015.

To access the report builder go to **Site administration >>>> Reports >>>> Report builder**. There are three options available: General settings, Manage reports, and RT Summary Tables.

- **General settings** is where to set default exporting and report building options.
- **Manage reports** is where to build new reports and access or edit user generated and embedded reports.
- **RT Summary Tables** is where to set the cron time to update data source tables.

Reports can be made available to end users through the My Reports block. To add the report block, select **Blocks editing on**. Scroll to the bottom of the page and in the **Add A Block** block, select **My Reports** from the dropdown menu. The block will populate with reports that each user has permissions to view. (See my reports block).

## General settings

The report builder General Settings provide formatting, exporting, date settings, and caching options at the system level. Reports can be further filtered at the report level. (see manage reports).

The General settings can be found under the menu: **Site administration >>>> Reports >>>> Report builder >>>> General settings**.

**Format export options** determine the format in which the report is published. Options include:

- Excel
- CSV (a common and simple file format widely supported)
- ODS (an operation data store designed to integrate data from multiple sources)
- Google fusion ([additional information](#))
- PDF (oriented as portrait / landscape)

### General settings

Format export options  
reportbuilder |  
exportoptions

- Export in Excel format
- Export in CSV format
- Export in ODS format
- Export to Google Fusion
- Export in PDF (Portrait) format
- Export in PDF (Landscape) format

Default: Export in Excel format, Export in CSV format, Export in ODS format, Export to Google Fusion, Export in PDF (Portrait) format, Export in PDF (Landscape) format

Report export settings allows a user with the appropriate permissions to specify the export options that are available for users at the bottom of a report page. This setting affects all Report builder reports.

When multiple options are selected the user can choose their preferred options from the export dropdown menu.

When no options are selected the export function is disabled.

The format export options affect all reports and allow users who have permission to view reports the ability to specify an export option that will display at the bottom of each report. When multiple options are made available, the user can choose a preferred export option via the export drop down menu when viewing the report. If the format export options is left blank (no export options are selected), the ability to export reports is disabled.

When **Export to file system** is enabled, it allows reports to be saved directly on a web server’s file system. By default this is set to **no**. This option is useful when a report needs to be accessed by an external system.

For example, you may have an existing HR system capturing information about employees who are a part of your organization and as those employees develop and progress through training delivered on the LMS, that information can be captured in the HR system via report builder reports saving directly to the external HR system.

<p>Export to file system reportbuilder   exporttofilesystem</p>	<p><input type="checkbox"/> Default: No</p> <p>Exporting to file system allows reports to be saved to a directory on the web server’s file system, instead of only emailing the report to the user scheduling the report.</p> <p>This can be useful when the report needs to be accessed by an external system automation, and the report directory might have SFTP access enabled.</p> <p>Reports saved to the filesystem are saved as '<b>Export file system root path</b>’/username/report.ext where <i>username</i> is an internal username of a user who owns the scheduled report, <i>report</i> is the name of the scheduled report with non alpha-numeric characters removed, and <i>ext</i> is the appropriate export file name extension.</p>
---	---

If the report needs to be accessed by an external system, enable this setting. Reports saved to the server’s file system are saved as **“Export file system root path”/username/report.ext**, where:

- username - is the internal username of the user who owns the report
- report - is the name of the report, which must be scheduled and exclude non alpha-numeric characters
- ext - is the appropriate export file name extension

The **File export path** tells the report where it should be exported to and stored on the external system. This is a writable directory and requires a correctly configured system path to ensure the reports are delivered. By default, there is no file export path provided. The file export path works in conjunction with the ‘Export to file system’ ability as the file export path tells the file(s) where to export to on the external file system.

<p>File export path reportbuilder   exporttofilesystempath</p>	<div style="border: 1px solid #ccc; padding: 2px; width: 300px; margin-bottom: 5px;"></div> <p>Default: Empty</p> <p>Absolute file system path to a writeable directory where reports can be exported and stored.</p> <p><b>Warning!</b> Make sure to configure a correct system path if you are going to export reports to file system.</p>
--	--

Enter the start date of a **Financial year** to be used in the reports content controls. This date is based on the UTC timezone (coordinated universal time which is the primary time standard the world regulates clocks and time. It is closely related to Greenwich Mean Time GMT).

Financial year start reportbuilder   financialyear	1	July	Default: 1 January
This setting allows to set the start date of the financial year which is used in the reports content controls.			

**Enable report caching** allows administrators to configure report caching and by default is set to **yes**. When caching is enabled, reports will display quicker as the information will be cached based on the settings at the report level.

Enable report caching enablereportcaching	<input checked="" type="checkbox"/> Default: Yes
This will allow administrators to configure report caching	