

Job Aid: Run Reports: Advanced Tasks

Description

The purpose of this job aid is to guide administrators through the step-by-step process of using the advanced tasks to work with reports in Plateau.

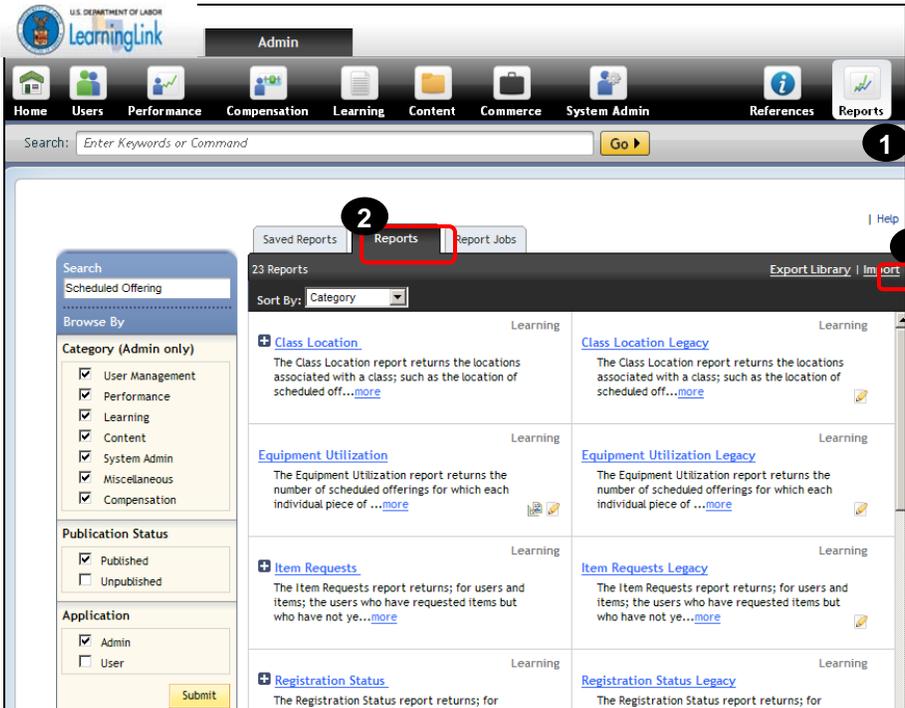
Tasks

- A. Import Reports
- B. Export Reports
- C. Edit Report Details
- D. Publish a Report
- E. Unpublish a Report

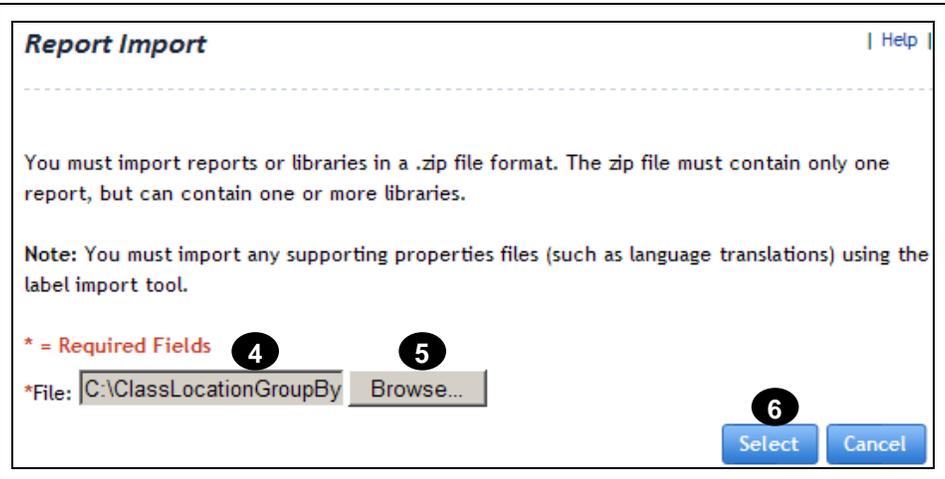
Note: This job aid contains a number of "Next steps." For additional information and details on these next steps, refer to the Plateau Report Designer course and materials.

Task A. Import Reports

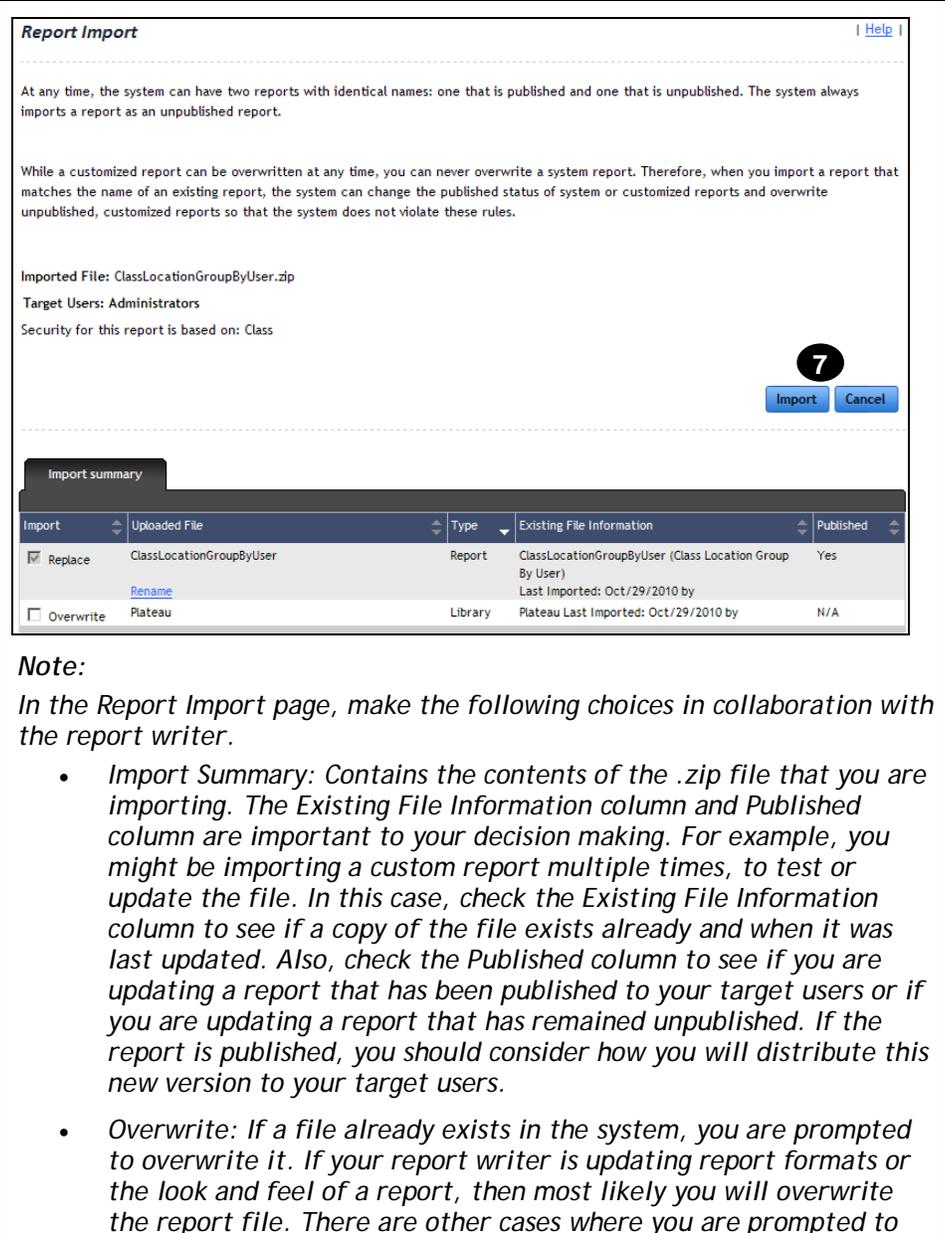
Note: If you are a member of a role that has the Import/Export Reports workflow, then you can import and export custom reports. If you go to Reports and you see the Import link, then you can import and export reports. Before you begin, see the Communication Checklist with Report Writers. The report writer should provide you with information included in the checklist.

<ol style="list-style-type: none"> 1 Navigate to Reports. 2 Verify you are on the Reports tab. 3 Select Import. 	<p><i>Note: Verify the Admin tab is selected.</i></p> 
--	--

- 4 Enter the full path to the zip file from the report writer in the File textbox.
- or
- 5 Select **Browse** to search for and locate the zip file.
- 6 Select **Select**.



- 7 Select **Import**.
Next steps:
 1. Import any labels that the report writer changed.
 2. Run unpublished report to test. (To run unpublished reports, your role must have access to the Run Unpublished Reports workflow.)
 3. Edit the attributes of the report as necessary.
 4. Publish the report.
 5. Once published, any target user in a role that has access to the Run Report workflow can run it.



Import	Uploaded File	Type	Existing File Information	Published
<input checked="" type="checkbox"/> Replace	ClassLocationGroupByUser	Report	ClassLocationGroupByUser (Class Location Group By User) Last Imported: Oct/29/2010 by	Yes
<input type="checkbox"/> Overwrite	Plateau	Library	Plateau Last Imported: Oct/29/2010 by	N/A

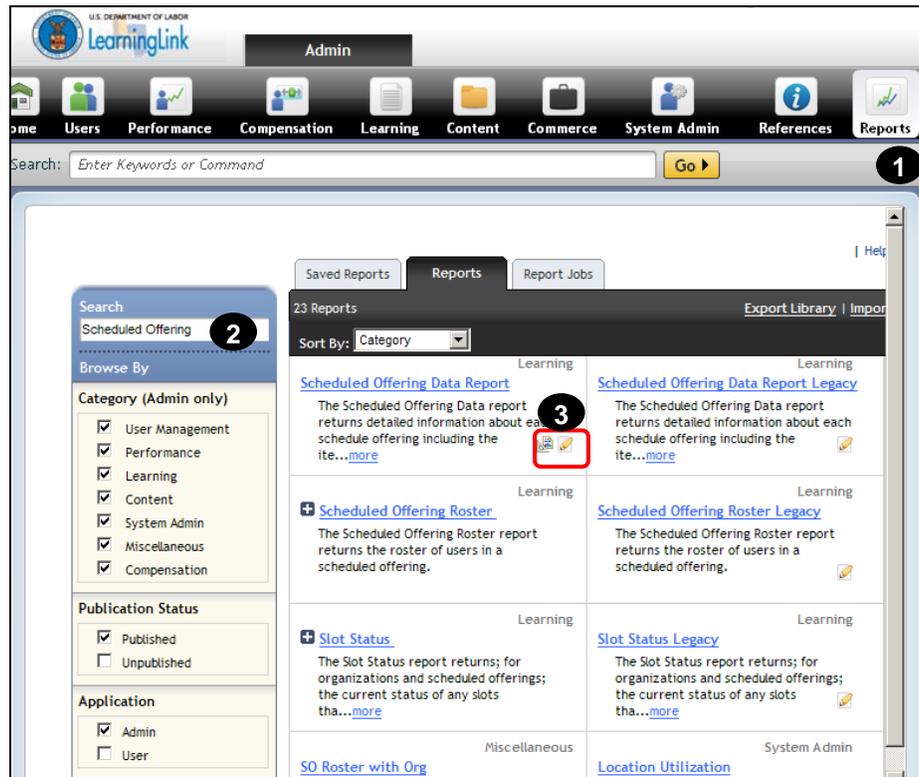
Note:
In the Report Import page, make the following choices in collaboration with the report writer.

- **Import Summary:** Contains the contents of the .zip file that you are importing. The Existing File Information column and Published column are important to your decision making. For example, you might be importing a custom report multiple times, to test or update the file. In this case, check the Existing File Information column to see if a copy of the file exists already and when it was last updated. Also, check the Published column to see if you are updating a report that has been published to your target users or if you are updating a report that has remained unpublished. If the report is published, you should consider how you will distribute this new version to your target users.
- **Overwrite:** If a file already exists in the system, you are prompted to overwrite it. If your report writer is updating report formats or the look and feel of a report, then most likely you will overwrite the report file. There are other cases where you are prompted to

either overwrite an existing library in the system or keep your current library. To resolve these issues, communicate with the report writer. If he or she has changed the library, and the new report requires the change, then you must overwrite your current library. However, other reports might also depend on the library, so before you publish a report, collaborate with the report writer to test your reports and other reports in the system.

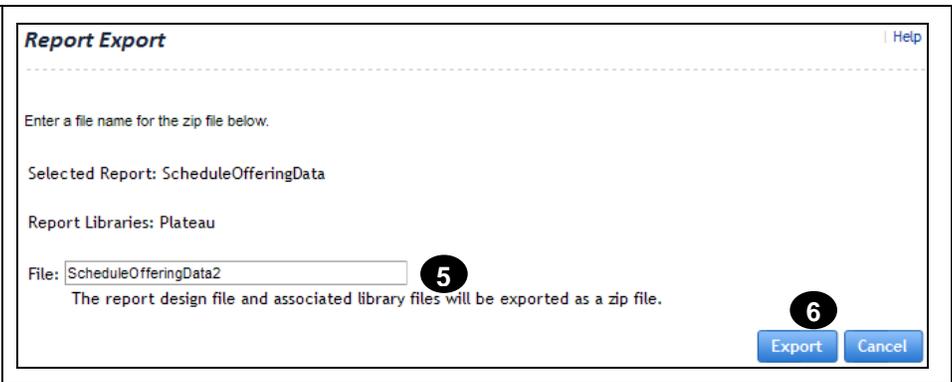
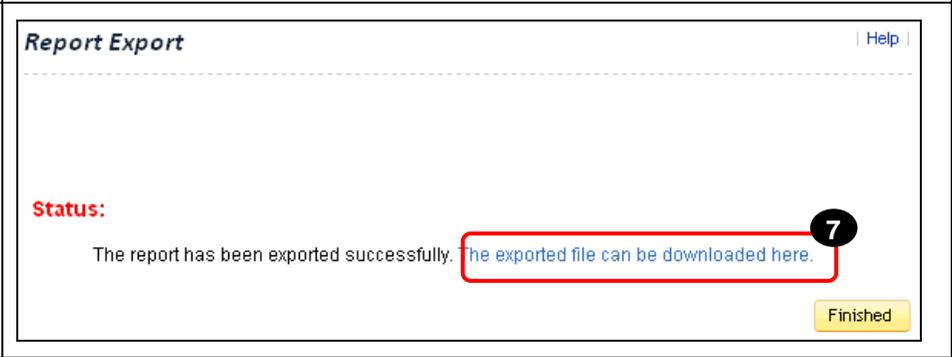
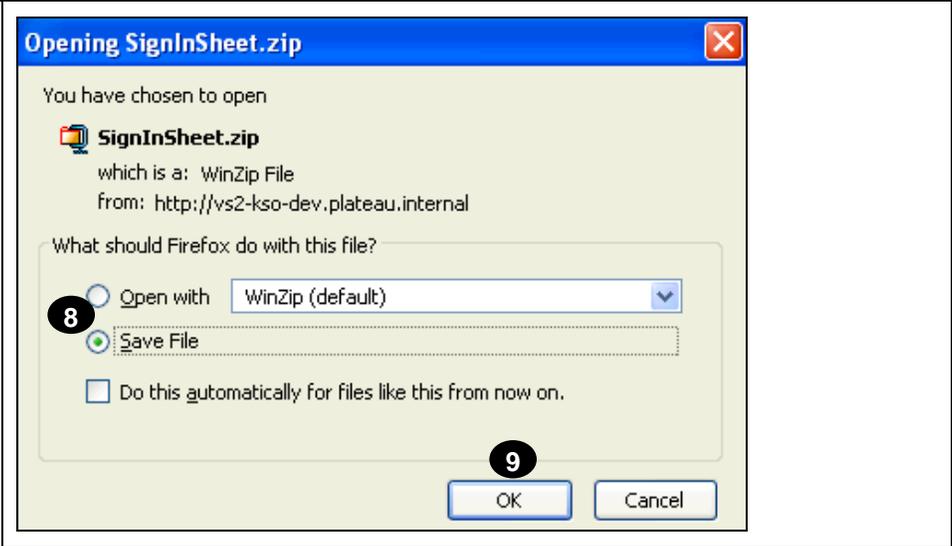
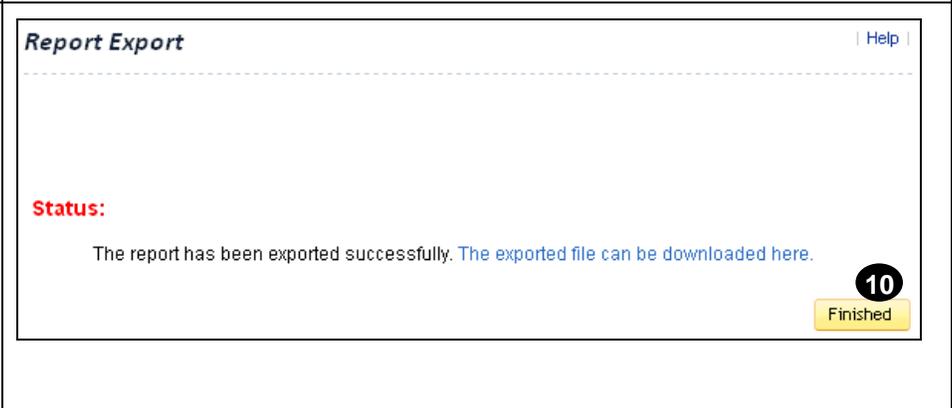
Task B. Export Reports

- 1 Navigate to Reports.
- 2 Use the Search and Browse By features to filter the reports list.
Locate the report to export. In this case, let's export the Scheduled Offering Data Report.
- 3 Select the Export icon (📄).
- or
- 3 Select the Edit icon (✎) for the report.

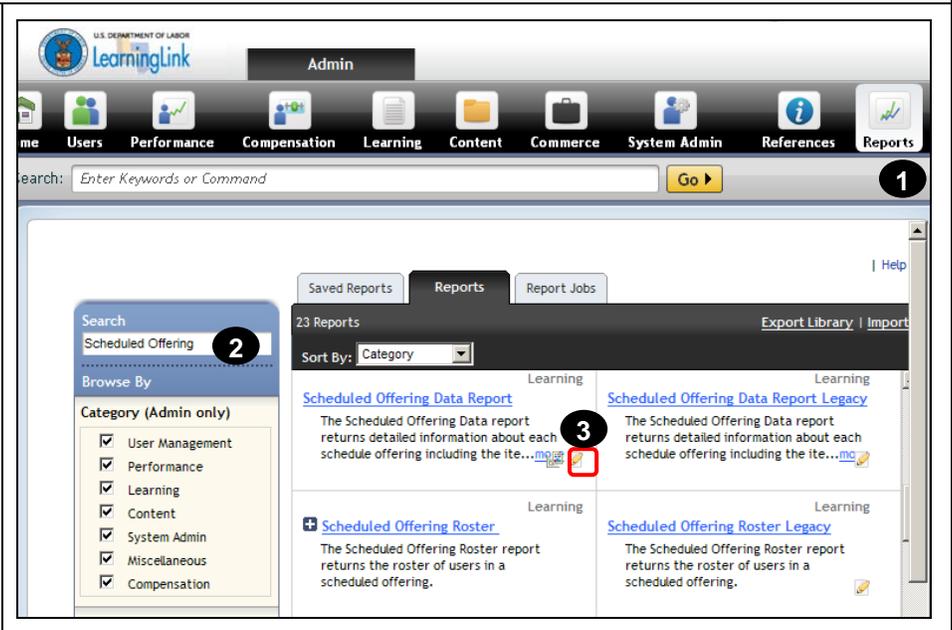
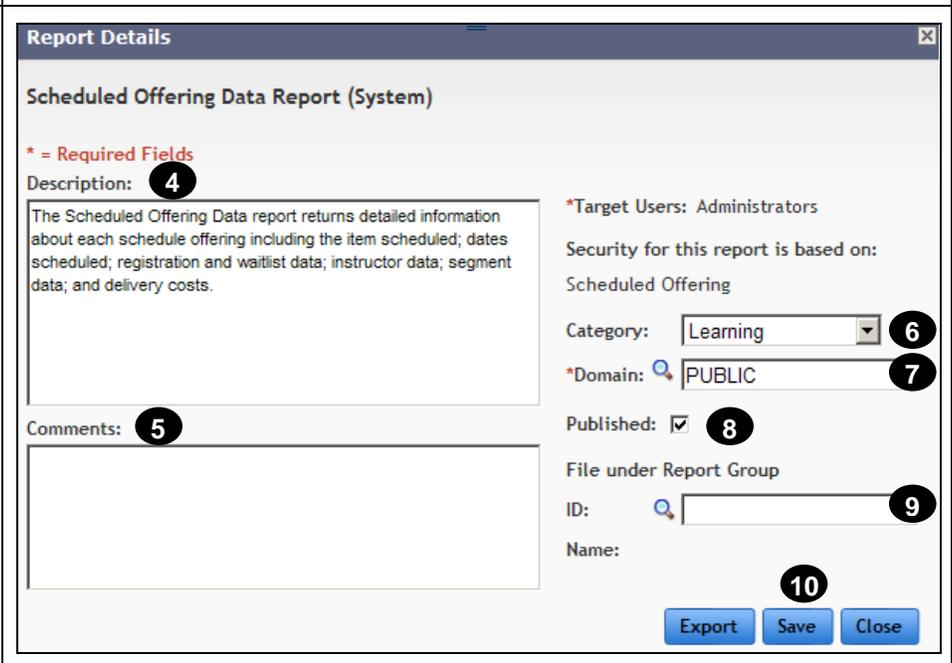


- 4 Select Export.



<p>5 Enter the file name in the File textbox.</p> <p>6 Select Export.</p>	
<p>7 Select the The exported file can be downloaded here link.</p>	
<p>8 Select Open with to open the file.</p> <p>or</p> <p>8 Select Save File to save the file.</p> <p>9 Select OK.</p>	
<p>10 Select Finished to return to the Reports screen.</p> <p>Next steps:</p> <ol style="list-style-type: none"> 1. Save the zip file as a backup of the current report state. 2. Send the exported zip file to the report writer for changes. 	

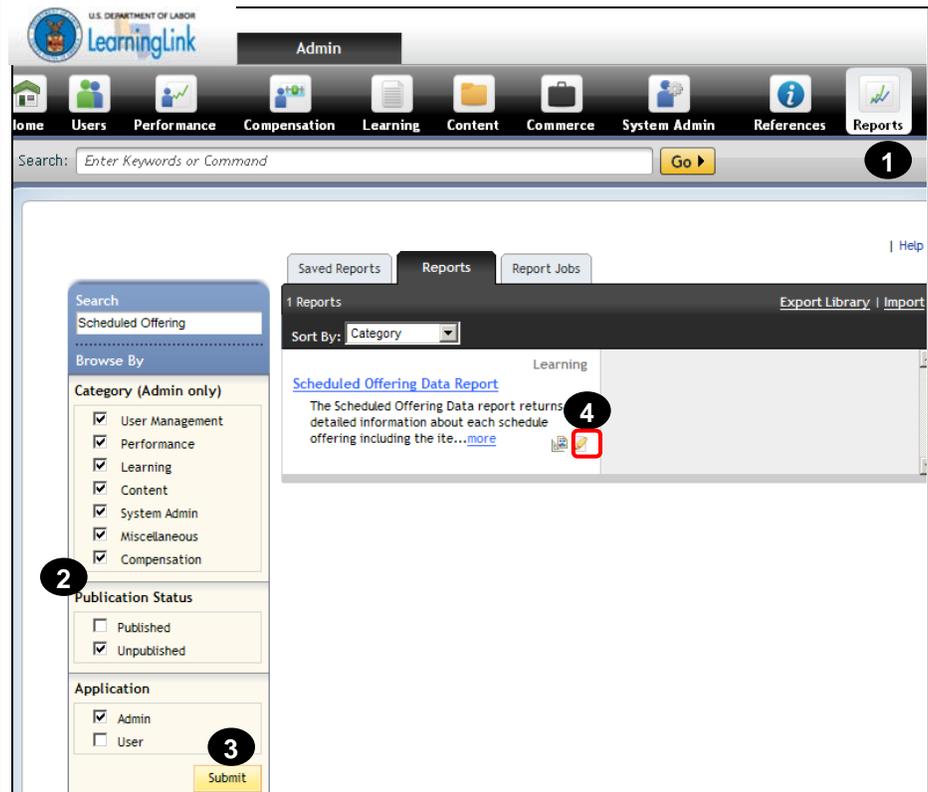
	<p>3. If the report writer edits the report in the zip file and sends it back to you, re-import the zip file into Plateau.</p>	
--	--	--

Task C. Edit Report Details		
<p>1 Verify the Admin tab is selected.</p> <p>2 Navigate to Reports.</p> <p>3 Use the Search and Browse By features to filter the reports list.</p> <p>Locate the report you want to edit. In this case, let's edit the Scheduled Offering Data Report.</p> <p>4 Select the Edit icon (🔗).</p>		
<p>4 Modify:</p> <ul style="list-style-type: none"> 5 - Report description 6 - Comments 7 - Category 8 - Domain 9 - Published 10 - Report Group ID <p>10 Select Save.</p>		

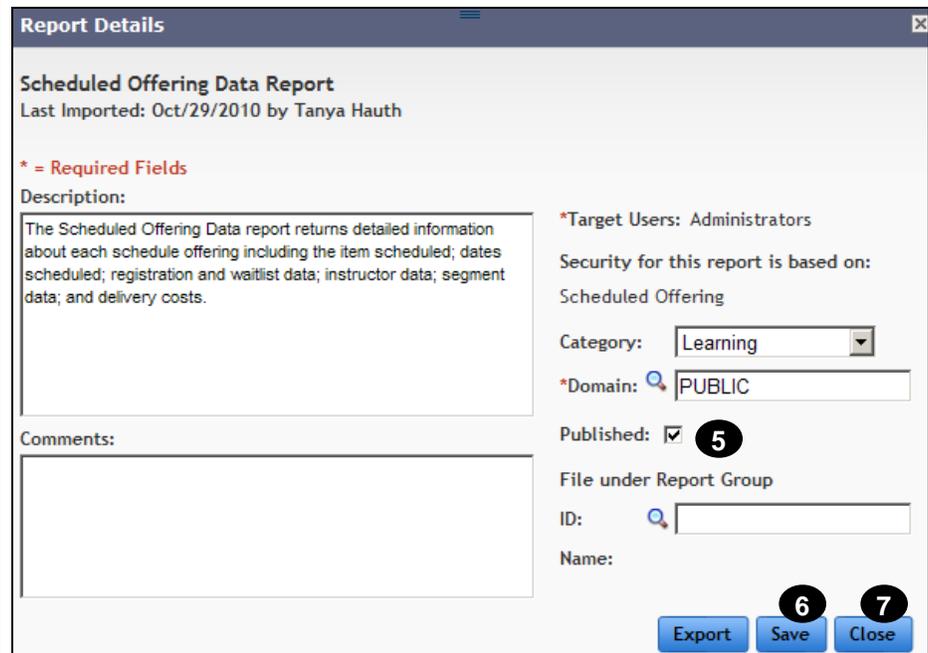
Task D. Publish a Report

Note: When you import a report for the first time, it is in the unpublished state. While it is in the unpublished state, you should test it to ensure that it works as expected. If possible, you should also ask the report writer to test the report. After you are satisfied that the report is working, you can publish it.

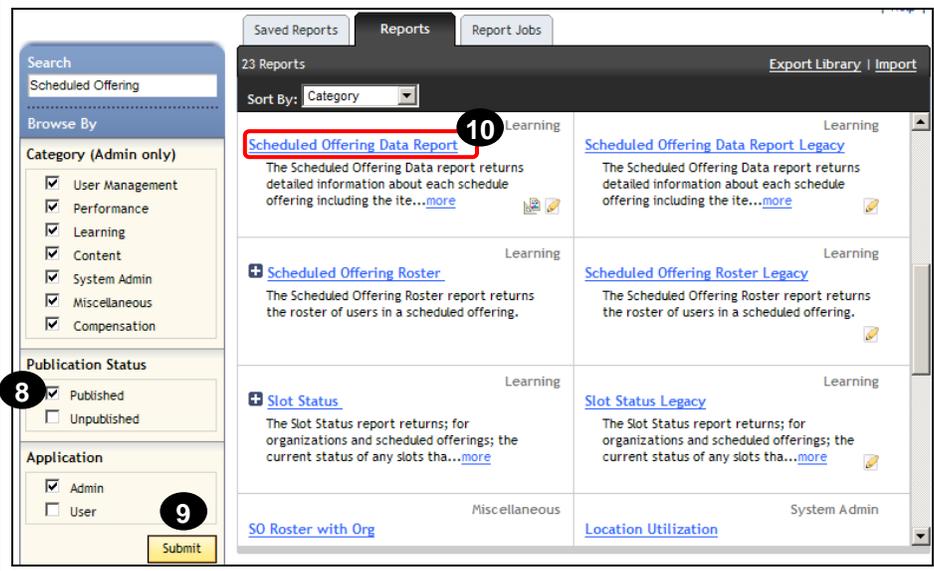
- 1 Navigate to Reports.
- 2 Use the Search and Publication Status features to filter the reports list.
- 3 Select Submit.
- 4 Select the Edit icon (📄).



- 5 Select to check the Published checkbox.
- 6 Select Save.
- 7 Once saved, Select Close.



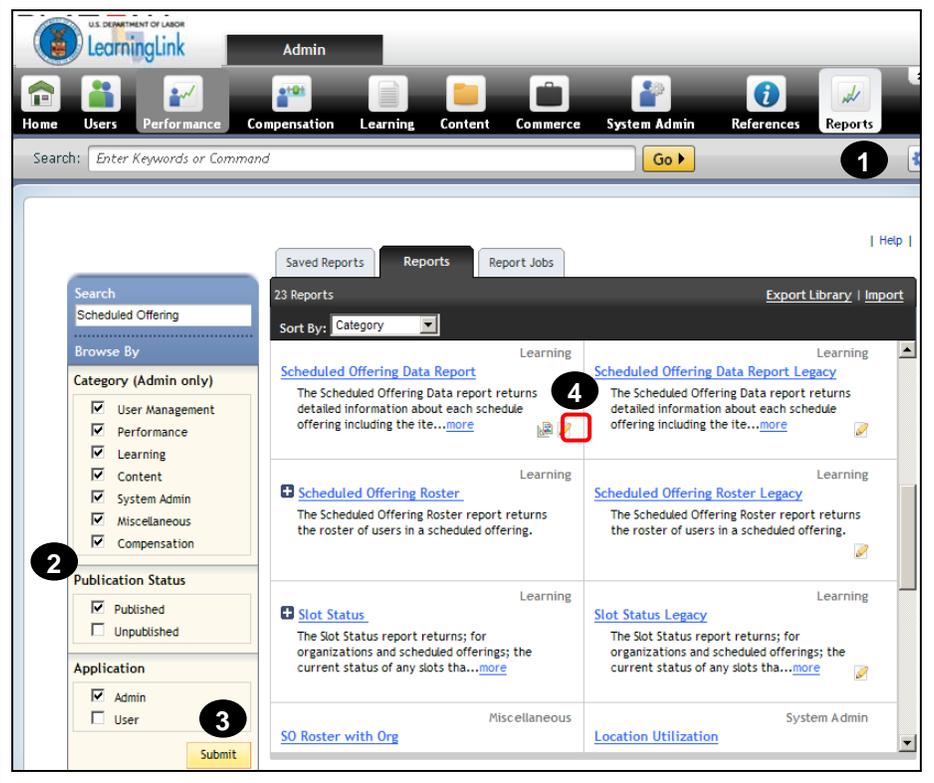
- 8 Modify the search criteria to show reports in **Published** status.
- 9 Select **Submit**.
- 10 Locate the published report.



The screenshot shows the 'Reports' section of the LearningLink interface. On the left, there are search filters: 'Search' (Scheduled Offering), 'Browse By' (Category), 'Category (Admin only)' (User Management, Performance, Learning, Content, System Admin, Miscellaneous, Compensation), 'Publication Status' (Published, Unpublished), and 'Application' (Admin, User). A 'Submit' button is at the bottom of the filters. On the right, a table lists 23 reports. The 'Scheduled Offering Data Report' is highlighted with a red box and a circled '10'. A circled '8' is next to the 'Published' checkbox in the filters, and a circled '9' is next to the 'Submit' button.

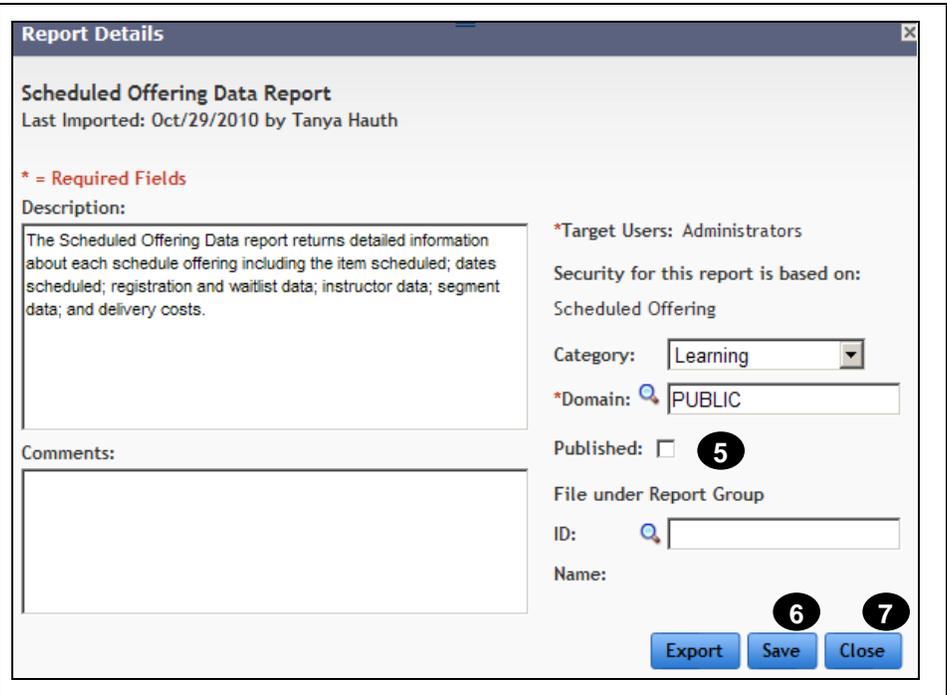
Task E. Unpublish a Report

- 1 Navigate to **Reports**.
- 2 Use the **Search** and **Publication Status** features to filter the reports list.
- 3 Select **Submit**.
Locate the report to unpublish. In this case, let's unpublish the **Scheduled Offering Data Report**.
- 4 Select the **Edit** icon (✎).



The screenshot shows the 'Reports' section of the LearningLink interface, similar to the previous one. The 'Scheduled Offering Data Report' is highlighted with a red box and a circled '4'. A circled '1' is next to the search bar. A circled '2' is next to the 'Unpublished' checkbox in the 'Publication Status' filter, and a circled '3' is next to the 'Submit' button.

- 5 Select to un-check the **Published** checkbox (i.e., clear the checkbox).
- 6 Select **Save**.
- 7 Select **Close**.



Report Details

Scheduled Offering Data Report
 Last Imported: Oct/29/2010 by Tanya Hauth

*** = Required Fields**

Description:
 The Scheduled Offering Data report returns detailed information about each schedule offering including the item scheduled; dates scheduled; registration and waitlist data; instructor data; segment data; and delivery costs.

Comments:

***Target Users: Administrators**

Security for this report is based on:
 Scheduled Offering

Category:

*Domain:

Published: **5**

File under Report Group

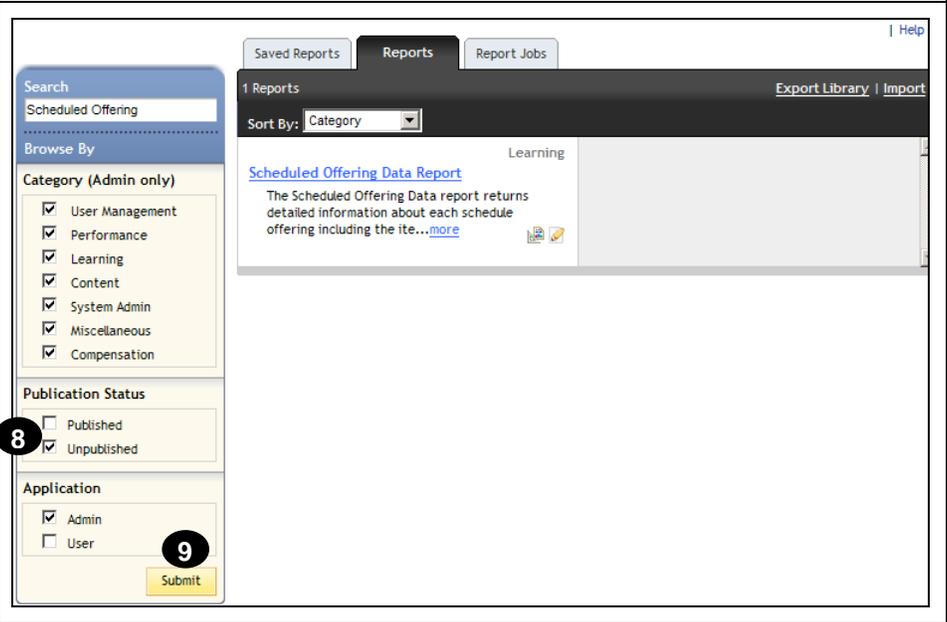
ID:

Name:

6 **7**

Export Save Close

- 8 Use the Publication Status feature to filter the reports list.
- 9 Select **Submit**.
 The reports list shows all unpublished reports.



Saved Reports | **Reports** | Report Jobs | Help

1 Reports Export Library | Import

Sort By:

Scheduled Offering Data Report
 Learning

The Scheduled Offering Data report returns detailed information about each schedule offering including the it...[more](#)

Search

Browse By

Category (Admin only)

- User Management
- Performance
- Learning
- Content
- System Admin
- Miscellaneous
- Compensation

Publication Status

- Published
- Unpublished **8**

Application

- Admin
- User **9**

Submit