How to use Customisable Reports

Transcript

[Title screen – ‘How to use customisable reports in MyPL’.]

Narrator: From the MyPL Homepage, accessing a Customisable Report can be done in 3 easy clicks. 1. Select the hamburger menu icon. 2. Select Manage Learning.

[Cursor navigates to the Manage Learning option from a drop-down list generated by selecting the hamburger menu icon in the upper-right side of the screen.]

Narrator: 3. Select Customisable Reports.

[Customisable reports is selected from a list of options in the left-hand ‘Manage Learning’ pane. It is the last selectable option within the Manage Learning sub-menu.]

Narrator: A list of all available reports will display. Scroll down and select the name of the report you wish to open.

[All reports appear in the main body of the page. The cursor navigates to the required report using the right scroll bar. The required report is selected from the list of reports.]

Narrator: You can view the report from here, or you can export the report to a spreadsheet.

[The selected report appears in the main body of the page and is browsed through using the right scroll bar. The Export button in the upper-right side of the report is then selected to export the report to a spreadsheet.]

Narrator: Simply open the report, then select Enable Editing.

[The Open button is selected from the dialogue box that appears at the bottom of the screen. The Enable Editing option is then selected from the top of the spreadsheet.]

Narrator: To quickly expand each column, select the field between the A and the 1. This will select the whole spreadsheet.

[All the columns and rows in the spreadsheet are selected by selecting the cell in the extreme top-left corner of the spreadsheet table.]

Narrator: Then double click on the column line break after the A. And there you have it! Each column has been instantly expanded so that all data in the report can be viewed.

[The spreadsheet columns expand when the cursor double clicks on a column line break.]

Narrator: If you would like to save the report to your local drive, you can do so from here. Let's return to MyPL.

[The Save button in the upper-left corner is highlighted to indicate where to select to save the spreadsheet report. The X or Close button in the upper-right corner is selected to close the spreadsheet report.]

Narrator: Do not use this 'Save Report' button (as you would only be saving a copy of a report that already exists). Let's go back to the Customisable Reports menu item.

[The MyPL page appears with the selected report displaying in the main body of the page. The Save Report button is highlighted on the report. Customisable reports is selected from a list of options in the left-hand 'Manage Learning' pane.]

Narrator: To open a report in a new tab, simply right-click on the report name, then select Open link in new tab.

[All reports appear in the main body of the page. The Open link in new tab option is selected from a list generated by right-clicking a report name.]

Narrator: By doing this, you can open multiple reports and toggle between them to compare the data, if required. Let's export the report.

[The new tab appears. The Export button in the upper-right side of the report is selected to export the report to a spreadsheet.]

Narrator: Enable Editing to adjust the report.

[The Enable Editing option is selected from the top of the spreadsheet generated by selecting the Open button from the dialogue box that appears at the bottom of the screen.]

Narrator: Once again, we'll expand the columns by selecting the whole spreadsheet, then double click on a column line break.

[All the columns and rows in the spreadsheet are selected by selecting the cell in the extreme top-left corner of the spreadsheet table. The spreadsheet columns expand when the cursor double clicks on a column line break.]

Narrator: Now that we can see all the data, let's add some filters. To do this, we'll need to first bold our headings. Simply highlight row 1, then select CTRL + B. Our headings are now bolded.

[The column headings in Row 1 are bolded by selecting the row header 1 and then selecting the Control button and the letter B on the keyboard, at the same time.]

Narrator: To add filters to the headings, we will need to create a table. Begin by selecting any populated cell, then select CTRL + A to select all the populated fields.

[The populated fields in the spreadsheet are selected by selecting a cell and then selecting the Control button and the letter A on the keyboard, at the same time.]

Narrator: Then simply select CTRL + T to create the table. Confirm you want the table to include the highlighted area. Each column now displays a filter.

[The Create Table dialogue box appears when the Control button and the letter T on the keyboard are selected at the same time. Filters, indicated by drop down arrows, are added to the right of each column header by selecting the Ok button in the dialogue box.]

Narrator: Let’s refine our Whole School Report to see who has completed the Code of Conduct training. Select the course drop down arrow.

[The cursor navigates to the Course column using the scroll bar at the bottom of the spreadsheet. The drop down arrow to the right of the Course column header is selected.]

Narrator: Enter the course name.

[A drop down pane appears displaying sorting options, text filters and a search field. The course name is entered in the Search field.]

Narrator: Deselect All, then select the course you wish to view the results for. Select OK.

[Selecting in the corresponding box to the left of an option adds or removes a tick which indicates if the option is selected or unselected. The OK button is selected after the Select All option is deselected and the required course name is selected from the list of options.]

Narrator: I can now only see the results for the selected course. If you see an empty field in the Completion date column, it means the person has enrolled in the course, but has not yet completed it.

[The Course column displays only the filtered results. An empty field in the Completion date column is highlighted to indicate that the course has not yet been completed.]

Narrator: Remember - accessing a Customisable Report can be done in 3 clicks.

[The three steps to access a Customisable Report are repeated. The cursor navigates to the Manage Learning option from a drop-down list generated by selecting the hamburger menu icon in the upper-right side of the screen. Customisable reports is then selected from a list of options in the left-hand ‘Manage Learning’ pane.]