



Oakland Community Health Network

Developmental Disabilities • Mental Health • Substance Recovery

Creating Reports

Quick Summary Reports

The screenshot shows the 'Reports' section of the Oakland Community Health Network's Data and Analytics Menu. The left sidebar contains navigation options: Home, Reports (selected), Background jobs, and a search bar. The main content area has a header with the Oakland Community Health Network logo, a search bar, and a '+ Create report' button. Below the header are three tabs: 'QUICK SUMMARY REPORTS & DASHBOARDS' (active), 'CUSTOM REPORTS BUILDER', and 'LEGACY REPORTS'. Under the active tab, there are four report cards:

- User Personal Summary**: View a user summary report and download it as a PDF. Includes a text input field labeled 'Type user here' and a 'GENERATE' button.
- Course Summary**: View a course summary report and download it as a PDF. Includes a text input field labeled 'Type course here' and a 'GENERATE' button.
- Courses Dashboard**: View Course Dashboard and download it as a PDF. Includes a 'VIEW' button.
- Branches Dashboard**: View branches dashboard and download it as a PDF. Includes a 'VIEW' button.

An annotation points to the 'User Personal Summary' card, stating: 'Enter the user's name here'.

How to View a User's Personal Summary

Option 1

- 1. From the **Users** menu, select your branch and locate the user whose summary you want to review.
- 2. Hover over the end of the user's row and click the **ellipsis menu** (three dots).
- 3. From the drop-down menu, select **User Personal Summary**.

Users

...

Import and manage

+ New users

Tester

OCHN Net...

SEARCH	USERNAME	FIRST NAME	LAST NAME	EMAIL	LAST ACCESS D...	CREATION DATE...	STATUS	LANGUAGE	EXPIRATION
Search all branches...	☐	DSPTester	DSP	Tester	tollont@oaklandc...	07/1/2026	06/4/2026	✓	English
OCHN Network	☐	12047924f	Tester	Testerson III	testemail@email.c...	05/27/2026	✓	English	...
Direct Support Professional	☐	12047924d	Tester	Test	nomail@email.com	04/9/2026	✓	English	
	☐	12047924c	Test	Testerson II	nomail@nomail.c...	04/2/2026	✓	English	
	☐	12047924b	Test	Testerson	noemail@nomail....	03/31/2026	✓	English	

User Personal Summary

Merge user

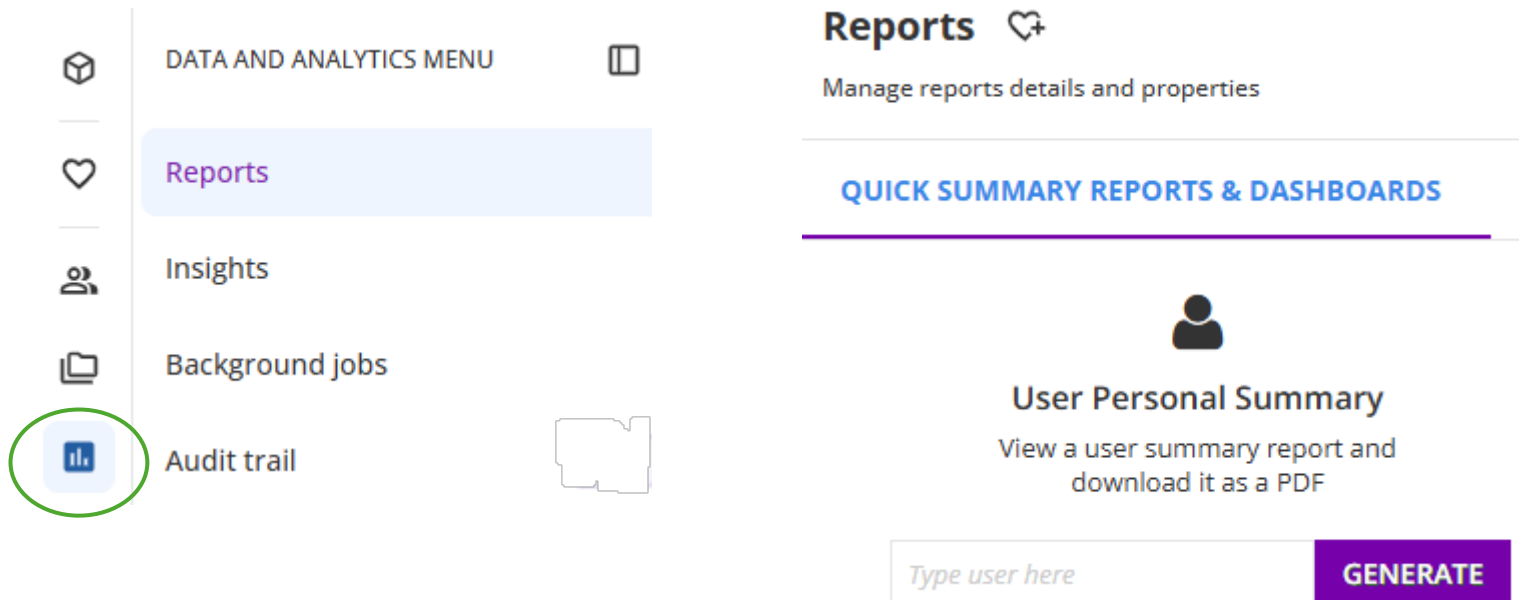
Channel

Edit

How to View a User's Personal Summary

Option 2

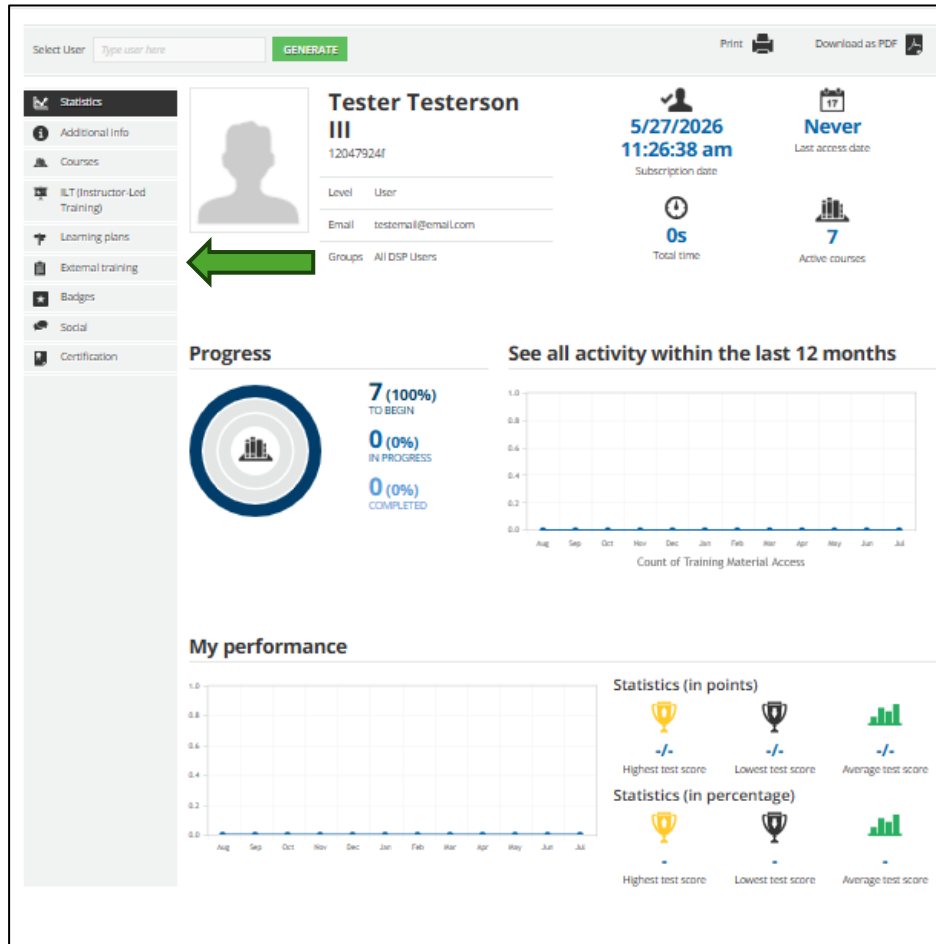
1. From the navigation menu, select the reports icon.
2. On the **QUICK SUMMARY REPORTS & DASHBOARDS** page there is a “User Personal Summary” report.
3. Enter the name of the user you would like to view in the search box.
4. Click “Generate” and it will bring up the user’s personal summary.



The screenshot displays the application's interface. On the left, a vertical navigation menu is shown with the following items: 'DATA AND ANALYTICS MENU' (with a cube icon), 'Reports' (with a heart icon and highlighted in light blue), 'Insights' (with a person icon), 'Background jobs' (with a folder icon), and 'Audit trail' (with a bar chart icon and circled in green). To the right of the menu, the 'Reports' section is visible, featuring a heart icon and the text 'Manage reports details and properties'. Below this, a horizontal bar highlights 'QUICK SUMMARY REPORTS & DASHBOARDS'. Underneath this bar, a user silhouette icon is positioned above the title 'User Personal Summary', which is followed by the description 'View a user summary report and download it as a PDF'. At the bottom of this section, there is a search input field containing the placeholder text 'Type user here' and a purple button labeled 'GENERATE'.

User Personal Summary Report

From the users summary report you can view the users eLearning courses, Instructor Led Training (ILT), trainings, learning plans, and certifications from the menu on the left side of the screen.



The screenshot displays the 'Courses' section of the User Personal Summary Report. It shows a list of courses with columns for Course Code, Course Title, User Status, Enrolled, Expiration Date, Course Completion, Credits (CEUs), Total Time, and Score. The enrollment status is set to 'Active enrollments'.

COURSE CODE	COURSE TITLE	USER STATUS	ENROLLED	EXPIRATION DATE	COURSE COMPLETION	CREDITS (CEUS)	TOTAL TIME	SCORE
DSP-1A	Introduction to Human Services and Meeting Special Needs	ENROLLED	5/27/2026		0%			
DSP-1C	Cultural Competency for Direct Support Professionals	ENROLLED	5/27/2026		0%			
DSP-2A	Environmental Emergencies & Emergency Preparedness	ENROLLED	5/27/2026		0%			
DSP-3Cd	Medication Administration: Documentation and Charting	ENROLLED	5/27/2026		0%			
DSP-4C	The Person Centered Planning Process for Direct Support Professionals	ENROLLED	5/27/2026		0%			
DSP-5B	Behavior & Crisis Intervention	ENROLLED	5/27/2026		0%			
DSP-10E	Limited English Proficiency (LEP) for DSPs	ENROLLED	5/27/2026		0%			
Total: 7								

Creating Custom Reports

Reports

Manage reports details and properties

QUICK SUMMARY REPORTS & DASHBOARDS

CUSTOM REPORTS BUILDER

LEGACY REPORTS

Updated data refresh
We have improved our data refresh process. Your data will now be refreshed in the background every hour with all the events of the preceding hour.

CLEAR

No new custom report yet

Use the Create Custom Report button to add a new custom report

CREATE REPORT

+ Create report

From the Reports page, click either the + **Create Report** button in the upper-right corner or the **CREATE REPORT** button at the bottom center of the screen to launch the Report Builder.

Creating New Custom Report



Step 1: Open the **Navigation menu** and click the **Data and Analytics** (chart icon), then select **Reports**.

Step 2: Click the plus icon in the top-right corner to open the Create a New Custom Report panel.

Step 3: Switch to the **Custom Reports Builder** tab to view existing reports or start a new one.

The screenshot displays the 'Reports' section of a dashboard. At the top, there's a 'Reports' header with a heart icon and a subtitle 'Manage reports details and properties'. To the right, there are two buttons: 'Reports Migration' and '+ Create report', both circled in red. Below these is a tabbed interface with three tabs: 'QUICK SUMMARY REPORTS & DASHBOARDS', 'CUSTOM REPORTS BUILDER' (which is selected and circled in red), and 'LEGACY REPORTS'. Below the tabs, a 'Create a report' panel is open, showing a progress bar with '1 Type' and '2 Details' steps. Under the 'Type' step, there's a section titled 'User reports' with a single report listed: 'Users - Courses'. The report description states: 'This report shows the progress details of the selected users, for each course.'

Creating a Custom Report: Properties

Crisis Missing Trainings

Use this area to configure and schedule your custom report

PROPERTIES FILTERS VIEW OPTIONS SCHEDULE PREVIEW

General

Manage report details and properties

Report Info

Name (required)

Crisis Missing Trainings

Provide a name for the report

24 / 150

Description is optional, but if sharing with others it is a good idea

Description

0 / 255

Type (read-only)

Users - Courses

This report shows the progress details of the selected users, for each course.

Report Download Permission from Link

☒ Login required to download the report

If this option is flagged, users will have to login in order to download the report using the link. If this option is not flagged, everyone who has the link can download the report, with the risk of losing control of data. If you cannot activate or deactivate this option, please contact your Superadmin.

Time Zone for Date Fields

Time zone

(GMT -04:00) America/Detroit

The report fields including a date will be displayed according to the selected time zone



Creating Custom Reports – Filters

PROPERTIES

FILTERS

VIEW OPTIONS

SCHEDULE

PREVIEW

Users

Apply this report to all users or select the users that you want to include in your report

User Selection

☐ All Users

☒ Custom Selection

This option cannot be left empty

Users

Type a username here

0/100

SELECT USERS

Groups

Type a group name here

0/50

SELECT GROUPS

Branches

Type a branch name here

0/50

SELECT BRANCHES

User options

☒ Hide deactivated users

☐ Show only users with learner as user course level

☒ Hide Expired Users

Additional fields

☐ Filter by User Additional Fields

This option allows you to filter your report by user additional fields (only dropdown additional field type) created by the Superadmin or Power Users for the users in the platform

Users

Courses

Date Options

Enrollment

Creating Custom Reports - Filters

Courses

Apply this report to all courses or select the courses that you want to include in your report

Course Selection

☐ All courses

This option will include present and future courses

☒ Custom selection

This option cannot be left empty

Courses

Suicide Prevention 101 ×

Acceptable Technology Use Policy ×

Workplace Violence: Warning Signs & Prevention ×

Sexual Harassment Prevention in the Workplace ×

Infection Prevention and Control ×

Workplace Diversity, Inclusion, & Sensitivity ×

Type a course title here

31/50

SELECT COURSES

Learning plans

Type a learning plan title here

0/100

SELECT LEARNING PLANS

Course type

☒ All types

☐ E-learning

☐ ILT

Course Expiration Date

☒ All Expiration Dates

☐ Select Expiration Date

This option only shows the courses for which an expiration date has been set

Additional Filters

Category

Select a category

SELECT CATEGORY

Course Options

☒ Hide archived courses

This option applies only when both the User selection and the Course selection filters are set to All. It has no effect when a custom selection of users or courses is used.

Creating Custom Reports - Filters

Course type

- ☒ All types You can choose E-Learning or Instructor Led Trainings (ILT).
- ☐ E-learning
- ☐ ILT Best practice is to choose all types.

Course Expiration Date

- ☒ All Expiration Dates Choose “All Expiration Dates”
- ☐ Select Expiration Date
This option only shows the courses for which an expiration date has been set

Additional Filters

Category

Select a category

SELECT CATEGORY

Course Options

- ☒ Hide archived courses
This option applies only when both the User selection and the Course selection filters are set to All. It has no effect when a custom selection of users or courses is used.

Be sure to save changes

SAVE CHANGES

Creating Custom Reports – Report Fields

Report Fields

Select the fields that you want to display in your report

User Fields

Select all

Choose the fields you would like to include in your report.

☒ Username

☐ Branch Path

☐ Date Of Birth (Mm/dd)

☐ Department

☒ Email

☐ Employee Type

☒ First Name

☐ Hire/start Date

☒ Last Name

☐ Ochn Employee Id

☐ User Creation Date

☐ User Last Access Date

☐ User Suspension Date

☐ What Service Do You Provide?

☒ Branch Name

☐ Branches Codes

☐ Deactivated

☐ Drivers License #

☐ Email Validation Status

☐ Employer

☐ Full Name

☐ Job Title

☐ Learning Plan Type

☐ Power User

☐ User Expiration Date

☐ User Level

☐ User Unique Id

Course Fields

Select all

☒ Course Title

☐ Additional Languages

☐ Certificates & Approved Ce Hours Description - Relias Library Solution

☐ Course Archived

☐ Course Category Code

☐ Course Creation Date

☐ Course End Date

☐ Course Internal Id

☒ Course Status

☒ Course Unique Id

☐ Additional Language Codes

☐ Certificate Content

☐ Certificates & Approved Ce Hours Description - Relias Library Solution

☐ Course Category

☒ Course Code

☐ Course Duration

☐ Course Has Expired

☐ Course Start Date

☐ Course Type

☐ Credits (Ceus)

12

Creating Custom Reports – Sorting Options

Choose the **OPTIONS** for how you would like your report sorted.

Sorting options

Choose the order in which you want to view your report's data

Order by

☒ Username (A-Z)

☐ Custom Field

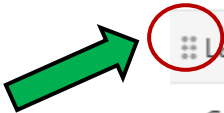
Selecting a custom field for the report sorting could affect the report generation speed

Columns Sorting

☒ Configure your custom columns sorting

Decide how to order your report's columns (that are the fields you selected in the Report Fields section). In the report preview and when exporting your report, you will see the sorting you choose here.

Drag and drop the report fields by highlighting the field you want to move and drag at the left side of the row with the dots.



Columns Sorting

Drag & drop the report fields you previously selected to reorder the columns of your report

REPORT FIELDS

Username

Branch Name

Email

First name

Last name

Course title

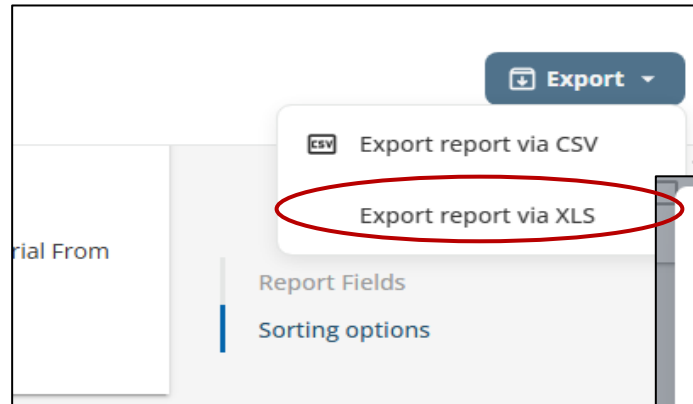
Course code

Course Status

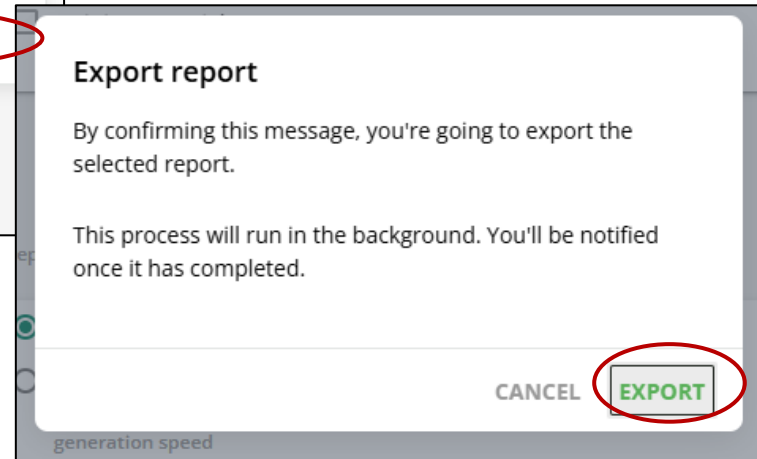
Course Unique ID

SAVE CHANGES

Creating Custom Reports – Exporting the report



1. Click on export via XLS.
2. Choose “Export report via XLS” (Excel).



3. Click the **EXPORT** button.

After the background job is complete. The report will be emailed to you. This sometimes takes several minutes depending on the size of the report.

