NOTES:

- This is intended to be an overview on how to run a simple report. The reporting capabilities are quite robust and you have options to create templates and schedule reports to run in the future. For further instructions on SkillPort reporting, please visit the SkillSoft Product Knowledge Base.
- At the bottom portion of the menu, you’ll see Legacy Reporting. This section lets you access older reporting functionality from a previous version of SkillPort.
- An overview of the reporting process is below:

```
Select a template

Preview the results

Does the template meet your needs?

- Yes
  - Save the results to reuse the data

- No
  - Edit the template and preview again, repeat until you are satisfied

Save the personal template to reuse it in the future

Create a schedule for the template to automatically run reports in the future
```
Step 1: After entering the Admin interface, click on Reports.

Step 2: To run a report, click on Templates to open the reporting interface and access a list of available reports. The primary reports you will want to run are located under the User and Content folders, depending on whether you want to report by user(s) or by asset(s). For example, if you had a specific group of courses and you wanted to know what usage had taken place, you’d focus on reports in the Content Activity folder. Likewise, if you were more interested in looking at the usage activity of a specific user or group of users, you’d focus on reports in the User folder. The most commonly used reports include:

- Course Activity by Content
- Asset Activity by User or Group
- User My Plan

Refer to the included “SkillPort Legacy to SkillPort 7.1 Reports Mapping Job Aid” for information on what new reports can be used to replace legacy reports.
Step 3: Once you’ve determined which report you’d like to run, select it and then click on **Preview**. The report will display in the Preview window. This will let you determine if the report meets your needs before you save the results. The preview is temporary and you must save the results in order to maintain the data.

Step 4: Edit the report to modify the dates, filters and display options, as desired.

Note: the default date range for a previewed report is the past full month plus usage up to the current day.
Step 5: Click on **Save Result**. Note that you can modify the report name and description. You can also select the format of the report: CSV (default), HTML or PDF. If you plan to do any data manipulation or filtering, select CSV to open the report in Excel. You can also change how quickly the report will be deleted from the site – as a best practice, it is recommended that you download your report and save it to your own PC.

Step 6: Click on **OK**.

Step 7: You will be brought to the **Results** tab where you can retrieve your report. It may take several minutes for your report to complete. Click on the **Refresh** button until the report appears.

Step 8: Select the report and either **Open** the report to view it, or **Download** it to your computer.