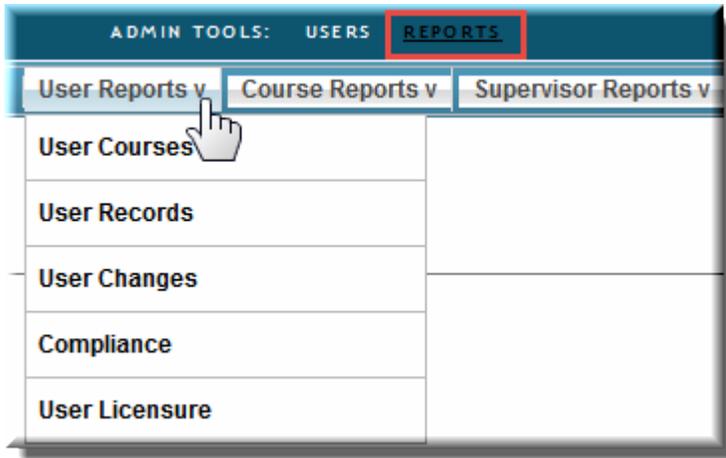

Viewing Reports

In order to track employee progress and proactively maintain required training compliance, supervisors are given access to a variety of reports. To view available reports, click Reports in the Admin Tools bar. The reports available for supervisors to view are determined by each organization.

A row of tabs will appear directly under the Admin Tools. Hold your cursor over a tab to expand the list of available reports in that section.



Each report has a set of filters available to narrow down results to specific users, courses and/or time frames.

The results of most reports can be exported to Excel and Printed if desired. When the results of a report appear, additional buttons will become available.



The export button will place the report data in Microsoft Excel as a .csv file. You may then use the tools within Excel to perform custom manipulations of the data if necessary for additional reporting.



The print button will open your browser's printing controls and provide a print friend version of the report data.

Select reports can also generate emails to users as prompts.

Next, we will review some of the most frequently used reports.

User Records

The User Records report is ideal for audits or to view what users have completed in a specified time period and/or course category. By default, this report will also show any courses that are assigned but not yet completed. If desired, the report printed as a transcript for placement in an employee's personnel file.

1. Hold your cursor over the **User Reports** tab.
2. From the menu that appears, click **User Records**.
3. A series of filters will appear to tailor your results if desired. By default, the results will include all users indicated as reporting to you and display all completed and assigned but not completed required courses.
 - A. To display results for a date range, enter a start and end date in the fields provided.



Courses completed are subject to the filters but all courses assigned as required that are not yet completed will be included in the results.

- B. By default the first filter is Users, and below it will display a list of users you have permission to see information on. Most supervisors will leave this filter as is. If you are a manager, and would prefer to see the list filtered by Department, Position, or Supervisor, these selections are also available via the dropdown menu.
- C. If you do not want to see results for all users you have access to, check only the names of those to be included.
- D. If you only want the results to include courses in a select category, check the categories to be included.



In most cases you will leave the default of All Categories selected.

- E. Check any desired filtering options.
For example: If you have an auditor coming in and I only want to display what has been completed, I would check the box next to **Completed Courses Only**.
- F. If you are running the report for several users at one time and plan to print them for an employee file, check the box **One User Per Page (Print View)**. Otherwise, if the report is printed there will be no separation between users.

4. Click the Run Report button.

User Records Report

Course Completions From: All Dates - Users Per Page: 250 One User Per Page (Print View)

Select Users Hide

Filter by:

- All
- Anderson, Marcus
 - Biggs, Jacob
 - Bradshaw, Raven
 - Byrne, Louise
 - Crane, Dennis
 - Derr, Adam

- All Categories
- Abuse
 - Addictions
 - Applied Behavior Analysis
 - Brief Therapies
 - Children/Adolescents
 - Corporate Compliance/Employment Law

- View Direct Report Only
- Include Inactive Users
- Include Demographics
- Completed Courses Only
- Incomplete Courses Only

Below is an example of what the displayed results for a user might look like:

- A. Basic demographic elements from the user profile. If you want additional user profile information included, click the Show link to expand the filters, check the box for **Include Demographics** and run the report again. If the report is exported to Excel, all user profile data elements will be included.
- B. Any License or Degree information that has been added to the user profile.
- C. By default, any courses that are assigned as required but not yet completed will appear at the top of the course list. The entry in course status will indicate where a user is in the completion process (NS = Not Started, IP = In Progress, COMP = Completed). To display only completed courses, click the Show link to expand the filters, check the box for **Completed Courses Only** and run the report again.
- D. Any due date appearing in red indicates a required course that has not been completed and is overdue.
- E. A total credits completed will appear at the bottom of the credits column. Credits for courses that are not completed are not included in this figure.

Select Users Show															
Emp ID: 1050		Last Name: Atkins		First Name: Ben		Position: COUNSELOR 3		Department: RTF		Supervisor: Fickley, Gloria		Hire Date: 10/27/2011		Status: Active	
Licenses:										<input type="button" value="Download"/> <input type="button" value="Print"/> <input type="button" value="Run Report"/>					
• Counselor Certification, PA, 652978															
Courses Name	Type	Category	Status	Assigned	Due	Complete	Credits	Score							
*NTST - 2014 Drug Free Workplace Policy	ONL	P&P	IP	10/15/2014	1/13/2015	-	0.25	-							
myAvatar Billing Demonstration	CLA	Technology	IP	11/13/2014	2/11/2015	-	1	-							
TIER_System_Administration	ONL	Applied Behavior Analysis	COMP	6/17/2013	9/15/2013	6/17/2013	0	100							
DV - Code of Conduct	ONL	General	COMP	7/2/2013	9/30/2013	7/2/2013	0	0							
*2014 - Drug Free Workplace	ONL	P&P	COMP	2/20/2014	5/21/2014	2/20/2014	0.25	100							
ICD10 DSM5	ONL	Applied Behavior Analysis	COMP	2/28/2014	5/29/2014	2/28/2014	1	100							
Meaningful Use Stage 2	ONL	Applied Behavior Analysis	COMP	8/25/2014	11/23/2014	8/25/2014	1	100							
MU_Test	ONL	Applied Behavior Analysis	COMP	8/25/2014	11/23/2014	8/25/2014	0.5	100							
Complete Total:							2.75								

Training Outstanding

The Training Outstanding report can be a useful tool for improving the compliance of users that report to you when run periodically. Results can be used to generate reminder emails of course assignments that are nearing their overdue date.

1. Hold your cursor over the **Supervisor Reports** tab.
2. From the menu that appears, click **Training Outstanding**.
3. Adjust the date in the **Due Before:** field as needed.
The default will be 30 days from the current date.
4. By default, you will have access to see the information on all users reporting to you either directly or indirectly. Adjust the User filters as needed to select specific Users, Positions, or Departments.
5. By default, results will include all active course titles. You can adjust this filter as needed to select specific course titles, bundles, or categories to narrow your results.
6. Click the **Run Report** button.

The screenshot shows the 'Training Outstanding Report' interface. At the top, the title 'Training Outstanding Report' is displayed with a blue callout box containing the number '3'. Below the title, there is a 'Due Before:' field with a date picker set to '5/27/2015' and a 'Users Per Page:' dropdown menu set to 'All'. A 'Select Users' section is highlighted with a blue callout box containing the number '4'. This section includes a 'Filter by:' dropdown menu set to 'Users', an 'Add Filter' button, and a 'Clear Filters' link. Below this, there is a list of users with checkboxes: 'All' (checked), 'Anderson, Marcus', 'Biggs, Jacob', 'Bradshaw, Raven', 'Crane, Dennis', 'Derr, Adam', and 'Devine, Lauren'. A second 'Filter By:' dropdown menu is set to 'Course' with a blue callout box containing the number '5'. Below it, there is a list of courses with checkboxes: 'All Courses' (checked), '*2014 - Drug Free Workplace', '*Agency Course Example', '*NTST - 2014 Drug Free Workplace Policy', '*Plexus and the Cloud', '*Plexus Update Complete', and '2014 Sexual Harassment Policy'. To the right of the course list is a checkbox for 'View Direct Report Only'. At the bottom right of the interface, there is a blue callout box containing the number '6' and a 'Run Report' button.

7. When the screen refreshes, review the available results.
 - A. A due date showing in red indicates the course is already overdue as of the current date.
 - B. Status:
 - NS = Not Started
 - Online Course - No course slides have been viewed.

- Classroom Course - User is not currently registered.
- IP = In Progress
 - Online Course - Some slides viewed but final test not completed successfully.
 - Classroom Course - User is registered for an available class.

8. By default, all results are selected. Uncheck the box for any user(s) you don't want to receive an email.

9. Click the **Email Users** button.

Training Outstanding Report

Due Before: Users Per Page: 9

Select Users [Show](#)

Select 8
Email Users **Email Supervisors** **Run Report**

Emp ID:	Last Name:	First Name:	Position:	Department:	Supervisor:	Hire Date:	Status:	
1027	Anna	Filter	ADMINISTRATIVE ASSISTANT	CLERICAL; Support	Connors, Tara	11/19/2014	Active	
Course Title		Type	Category	Status	Credits	Frequency	Last Done	Due
*Images in myAvatar		ONL	Management	NS	1	0	-	8/10/2015
Major Depressive Disorder in Children and Adolescents, Module 3: Evidence Based Practices v.2		ONL	ABUSE	IP	1	0	-	8/5/2015
Total:					2			

Emp ID:	Last Name:	First Name:	Position:	Department:	Supervisor:	Hire Date:	Status:	
678	Devine	Mamie	-	-	Ransic, Gilda	1/1/1990	Active	
Course Title		Type	Category	Status	Credits	Frequency	Last Done	Due
*Images in myAvatar		ONL	Management	NS	1	0	-	5/31/2015
Major Depressive Disorder in Children and Adolescents, Module 3: Evidence Based Practices v.2		ONL	ABUSE	NS	1	0	-	7/27/2015
Total:					2			

This report relies heavily on each user having a valid email address included in their profile. If a user is not receiving emails, check with your Site Administrator to ensure that their profile information is complete and correct. Your Site Administrator can also verify if prior emails were generated and sent to the correct email addresses.