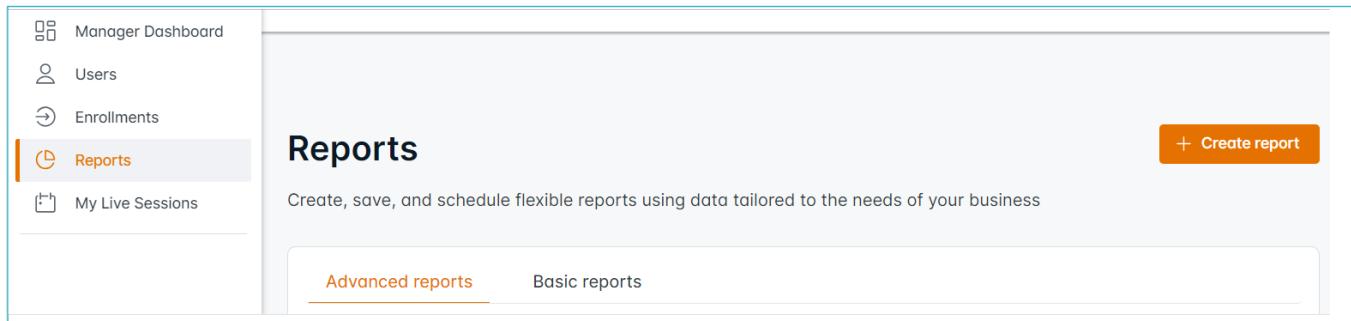


## Manager: Running Reports

As manager, you can run reports to see your employees' activity and their training history.

There are two main types of reports, **Basic** and **Advanced**. You can build reports using the course and learner data of your employees. You can run the reports to download immediately. You can save and schedule some **Basic reports**. That feature is not as yet available for **Advanced reports**.



Manager Dashboard

Users

Enrollments

Reports

My Live Sessions

## Reports

Create, save, and schedule flexible reports using data tailored to the needs of your business

Advanced reports Basic reports

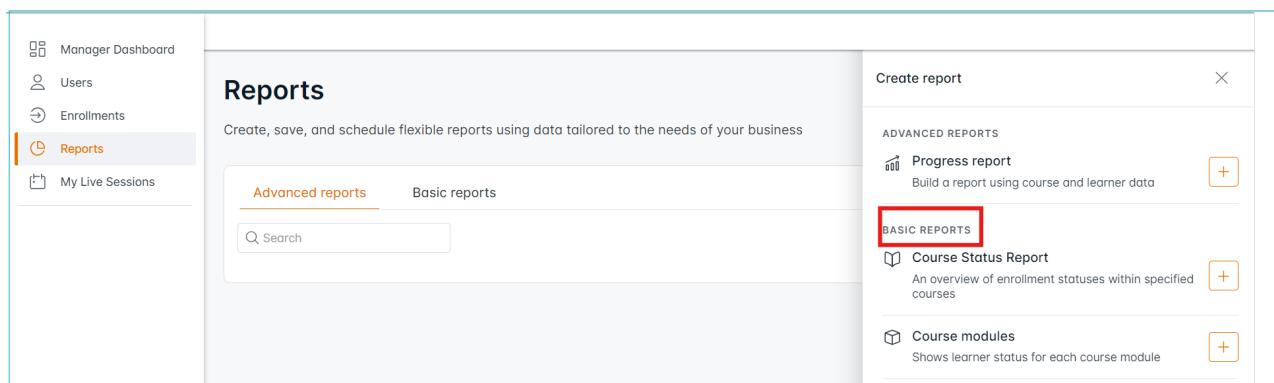
+ Create report

**Note:** Newly-assigned managers can encounter temporary delays, the first time they run a basic course status report. If the delays persist contact the LMS Administrator at [csc@gov.ky](mailto:csc@gov.ky).

## Running a Basic Report

To see the basic reports available for your portal:

1. From the primary navigation (see LMS navigation guide), select **Reports > Create report** to open the report type menu.
2. From **Basic Reports**, select a report type.



Manager Dashboard

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## Reports

Create, save, and schedule flexible reports using data tailored to the needs of your business

Advanced reports Basic reports

Q Search

Create report

ADVANCED REPORTS

Progress report Build a report using course and learner data +

**BASIC REPORTS**

Course Status Report An overview of enrollment statuses within specified courses +

Course modules Shows learner status for each course module +

When you run a basic report, you get an onscreen display version for quick review, and an option to download to CSV or PDF.

Downloaded basic reports are more complete and detailed than onscreen displays, with more columns of data. If you're new to basic reports, download samples of each report to find out what's available. You may see some or all of the following:

- **Course Status:** how many learners have reached which statuses for a course
- **Course Modules:** statuses of each module, along with started and completed timestamps
- **Course History:** record of enrollments for a specific learner
- **Learning Paths:** status of learners on a learning path
- **Certifications and Credits:** record of recognitions given for a course, learning path, or user
- **External Trainings:** report on any external training your learners record in CSC Online
- **Exams:** review of exam answers, provided in charts or transcripts
- **Survey:** review of survey answers, provided in charts or transcripts
- **SCORM Exams/Interactions:** for modules that report interaction data, report on module-specific interaction data
- **Tin Can Exams/Interactions:** for modules that report interaction data, report on module-specific interaction data
- **Gamification:** achievements of levels by individuals and groups

## Running a Basic Report: Example – Course Status Report

The **Course Status** report shows you all the learners enrolled on a specific course. This is good, for example, for checking completion rates for compliance courses.

1. From primary navigation (see LMS navigation guide), select **Reports > Create report**.
2. From **Basic Reports**, click the **+** button beside **Course Status** report.
3. Select the course(s) to include in your report.
4. You do not have to select any other fields. All that's needed to run the report is selecting at least one course. You can use the other fields to filter your report (including **Custom User Data filters**).
5. Select **Run Report**.

Filters

Report Type

Course Status

Courses

Search by course name

30 Day Onboarding v.1  
Assignment Course v.1  
Climate Change Policies v.1  
Course Testing - Tavia - V2 v.1  
Data Security v.2  
Data Security v.1  
Exam Course v.1  
HR Compliance v.1

Select all | Deselect all

Date From

Set Date

Date To

Set Date

Groups

Department: Finance

Statuses

In Progress  
Pending Review  
Completed  
Passed  
Failed

User Status

Login enabled  
Login disabled

User Type

Learner  
Admin  
Instructor  
Manager

Custom User Data Filters ▾

After running the report once you can:

- edit the filters to change the results, and select **Run Report** to repeat the run
- select **Reset Filters** to start over
- select **Export to CSV** or **Export to PDF** to download a complete report
- select **Schedule** to run the report daily, weekly or monthly.

The screenshot shows a dashboard with the following statistics:

- Not Started: 11
- In Progress: 6
- Completed: 0
- Passed: 2
- Failed: 1
- Pending Review: 0
- Past Due: 1

Below the dashboard are two report tables:

**30 Day Onboarding v.1**

<input type="checkbox"/> Name	Email	Enrolled	Started	Completed	Score	Status
<input type="checkbox"/> Marco Wright		25/05/2023	25/05/2023	25/05/2023	100%	Passed
<input type="checkbox"/> Thomas Dillon		25/05/2023	25/05/2023	-	-	In Progress

**Assignment Course v.1**

<input type="checkbox"/> Name	Email	Enrolled	Started	Completed	Score	Status
<input type="checkbox"/> Manager Cayman		13/06/2023	-	-	-	Not Started
<input type="checkbox"/> Learner Cayman		13/06/2023	28/06/2023	-	-	In Progress

At the bottom of the dashboard are several buttons:

- ▶ Run Report
- ⌚ Reset Filters
- 📄 Export to CSV
- 📄 Export to PDF
- ⌚ Schedule

**Note:** In the report, the **Enrolled** date is the date a learner is enrolled on a course by an admin, by a manager, or by self-enrollment. The **Started** date is the date the learner selected the course **Start** button.

## Schedule a Basic Report

1. After running the report (see example above), click the **Schedule** button.
2. Give the report a title and choose to send the report **Daily, Weekly or Monthly**.
  - o For **Weekly** or **Monthly**, select the day or date respectively.
3. Click **Create**.

Form for creating a new report:

Title	
New Course Status Schedule	
Repeats	Repeat on
Weekly	<input type="checkbox"/> Sun <input type="checkbox"/> Mon <input type="checkbox"/> Tue <input type="checkbox"/> Wed <input checked="" type="checkbox"/> Thu <input type="checkbox"/> Fri <input type="checkbox"/> Sat
 <a href="#">View report</a>	
<a href="#">Create</a> <a href="#">Cancel</a>	

**Note:** To edit the report, click the 3 dots to the right of the report and select **Edit**.

Advanced reports		Basic reports		
Name	Report Type	Last Run	Schedule	⋮
New Course Status Schedule	Course status	2024-08-16T15:03:16Z	Monthly	⋮

## Running a Basic Report: Example – External Training

You can use the **External trainings** report to view the external (not offered through the LMS/attended outside of CIG. E.g., conferences). This report can only be run for one employee at a time.

1. From primary navigation select **Reports > Create report**.
2. From **Basic Reports**, click the + button beside **External trainings** report.
3. Select the user for whom you want to run the report.
  - o You do not have to select any other fields. All that's needed to run the report is selecting the user. You can use the other fields to filter your report.
4. Select **Run Report**.

Filters

Report Type	External Training	Date From	Set Date	Date To	Set Date
User	Learner Cayman				

Learner Cayman

Name of the activity	Credit Type	Number Of Credits	Score	Date Completed	Expiry date
Core Competency - Individual Contributor	CC	25.0	N/A	30/06/2023	N/A

Total Credits

CC: 25.0
----------

Run Report | Reset Filters | Export to CSV | Export to PDF

After running the report once you can:

- edit the filters to change the results, and select **Run Report** to repeat the run
- select **Reset Filters** to start over
- select **Export to CSV** or **Export to PDF** to download a complete report

## Running an Advanced Report

The advanced report available is the **Progress report**. It provide highlights for quick review: see the "headline" numbers at the top of each report.

**Note:** For a **Progress report**, you can select up to 100 courses for the report, or leave the field empty to report on all courses.

1. From main navigation go to **Reports > Create report**.
2. From **Filters**, select the filters you need.
3. Select **Report Layout** to set layout options:
  - o Select columns from **Available Data** to add to **Your Report**
  - o Remove columns from **Your Report** by selecting **X** on the column name
  - o Drag and drop columns to change their display order
4. When complete, select **Create report**.

The screenshot shows the 'Filters' tab of a report creation interface. The interface is divided into several sections: 'Course' (with a dropdown for 'Select course'), 'User' (with a dropdown for 'Select user'), 'Group' (with a dropdown for 'Select group'), 'Enrollment period' (with a 'Custom range' dropdown and date pickers for 'From' and 'To'), 'Completion period' (with a 'Custom range' dropdown and date pickers for 'From' and 'To'), 'Progress' (with checkboxes for 'Not started', 'In progress', 'Pending review', 'Completed', 'Passed', and 'Failed'), 'Overdue' (with checkboxes for 'Yes' and 'No'), and 'User login' (with checkboxes for 'Enabled' and 'Disabled'). At the bottom, there is a 'Custom user data' section with a 'Create report' button.

Filters Layout

Filter the data you use to build your report using some or all of the fields below. If you don't want to filter your data, you can go directly to [Layout](#) to get started.

① If you leave a field blank, the report uses all data available for this filter type.

Course

Select course

User

Select user

Group

Select group

Enrollment period

From DD/MM/YYYY To DD/MM/YYYY

Completion period

From DD/MM/YYYY To DD/MM/YYYY

Progress

Not started  In progress  Pending review  Completed  Passed  Failed

Overdue

Yes  No

User login

Enabled  Disabled

Custom user data

[+ Add as filter](#)

Create report

## Example results:

Progress report						Export	Edit																																													
NOT STARTED 11	IN PROGRESS 6	PENDING REVIEW 0	COMPLETED 0	PASSED 2	PAST DUE 1 ⓘ																																															
FAILED 1 ⓘ																																																				
<table><thead><tr><th>Full name</th><th>Email</th><th>Course name</th><th>Progress</th><th>Score</th><th>Course completion %</th><th>Enrolled</th><th>Started</th><th>Last updated</th></tr></thead><tbody><tr><td>Marco Wright</td><td></td><td>30 Day Onboarding v.1</td><td>PASSED</td><td>100%</td><td><div style="width: 100%;">100%</div></td><td>25/05/2023 11:10</td><td>25/05/2023 11:12</td><td>25/05/2023 11:12</td></tr><tr><td>Thomas Dillen</td><td></td><td>30 Day Onboarding v.1</td><td>IN PROGRESS</td><td>0%</td><td><div style="width: 25%;">25%</div></td><td>25/05/2023 11:10</td><td>25/05/2023 11:18</td><td>25/05/2023 11:18</td></tr><tr><td>Manager Cayman</td><td></td><td>Assignment Course v.1</td><td>NOT STARTED</td><td>0%</td><td><div style="width: 0%;">0%</div></td><td>13/06/2023 18:57</td><td>-</td><td>-</td></tr><tr><td>Learner Cayman</td><td></td><td>Assignment Course v.1</td><td>IN PROGRESS</td><td>0%</td><td><div style="width: 0%;">0%</div></td><td>13/06/2023 18:57</td><td>28/06/2023 19:55</td><td>28/06/2023 19:55</td></tr></tbody></table>								Full name	Email	Course name	Progress	Score	Course completion %	Enrolled	Started	Last updated	Marco Wright		30 Day Onboarding v.1	PASSED	100%	<div style="width: 100%;">100%</div>	25/05/2023 11:10	25/05/2023 11:12	25/05/2023 11:12	Thomas Dillen		30 Day Onboarding v.1	IN PROGRESS	0%	<div style="width: 25%;">25%</div>	25/05/2023 11:10	25/05/2023 11:18	25/05/2023 11:18	Manager Cayman		Assignment Course v.1	NOT STARTED	0%	<div style="width: 0%;">0%</div>	13/06/2023 18:57	-	-	Learner Cayman		Assignment Course v.1	IN PROGRESS	0%	<div style="width: 0%;">0%</div>	13/06/2023 18:57	28/06/2023 19:55	28/06/2023 19:55
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You can export the report or edit it to add other/more filters.