

# Navigating the Report Area

#### Basics for navigating to the report area:

- 1. Click on '*manage'* in the top toolbar.
- 2. Click on '*report builder'* under panel on the left.

- Home Me Training Conter	Tools Manage	EN Ů
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	Online Academy	1
Administration	Academy control papel	(GMT-05:00) Eastern Time (US and Canada)
Administration <u>m</u> Panel	Academy control panel Members Dashboard	(GMT-05:00) Eastern Time (US and Canada)

#### 3. Click on '*private reports*' and 'create new report'.

Academy control panel								
Reporting - Report Builder								
Public Reports	Public Reports Private Reports Scheduled Reports for others							
Create New Report								

## Creating a report showing who is certified:

- 1. Click on '*vignettes*' in the menu on the left.
- 2. Click on '*vignettes certification attempt report*' and click '*continue*'.

		Choose Report Type
All		
Courses		
Curricula	Vignettes Certification Attempt Report	
Events	Vignettes Best Attempt Report	
Academy	Vignettes Latest Successful Attempt Report	
Exams	Vignettes Ali Successful Attempts Report	
Vignettes	Vignettes All Failed Attempts Report	
Polls	Vignettes Detailed Attempt Report	
Gamification	Vignettes Stories Report	
Groups	Vignettes Last Expired Certification Attempt Report	
Bundles	Vignettes All Attempts Report	
Credentialing Materials		
Custom		
		Continue Control

- 3. At the top select your parameters. One of the 3 fields must be selected for the report to generate.
  - a. '**Choose Jurisdiction'** note: this may be pre-selected if your admin access is for a specific regional area
  - b. '**Choose Agency**' note: this may be pre-selected if your admin access is for a specific agency
  - c. '**Choose Job'** if you want a report that shows only data from '*Trainers/SuperUsers*', select '*Trainer*' in this field

					/		,		
Get the following reports for:	Choose Type	-	Choose Jurisdiction	-	Choose Agency	•	Choose job	•	0
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- 4. On the left select your parameters:
  - d. Select which course(s) you'd like a report for.
  - e. Select whether or not you want to schedule the report to come to your email at a regular frequency
  - f. Add/remove any fields you would like to add/be left out of your report
    - i. I always suggest adding '*agencies*' under '*choose field*'.



- 5. Click '*save*' in the top right-hand corner.
- If you need the report on demand click the '*download*' button under the private reports' area next to the report you just made.

Report Name	Owner	Created At 🕶	Scheduled	Action
Vignettes Certification Attempt Report	Lauren Schmidt	Sep 07, 2021		🍲 🗾 🖻

### Creating a report to see who is enrolled in a course:

- 1. Click on '*courses*' in the menu on the left.
- 2. Click on '*courses report*' and click '*continue*'.

	Choose	Report Type					
All .							
Courses	Search Report Types						
Curricula	Courses Report						
Events	Courses Count Per Course Report						
Academy	Courses Count Per User Report						
Exams	Courses Count Per Agency Report						
Vignettes	Courses Reviews Report						
Polls	Courses Steps Info Report						
Gamification	Courses Due Date Report						
Groups	Courses Exception Report						
Bundles	Courses Duration Report						
Credentialing Materials	Users Steps Course Report						
Custom	Courses Equivalent Report						
	Compliance Courses Count Per Agency Report						
	Courses Count Per Jurisdiction Report						
	Courses Compare Overview Per Agency Report						
	Courses Compare Detailed For Items Per Agency Report						
	Courses Compare Detailed For Jobs Per Agency Report						
	Courses All Time Report						
	Courses Steps All Completions Report						
	Courses info Report						
	Courses Coupons Report						
	Courses Domains Count Per Course Report						
	Courses Domains Count Per Agency Report	_					

- 3. At the top select your parameters. One of the 3 fields must be selected for the report to generate.
  - a. '**Choose Jurisdiction**' note: this may be pre-selected if your admin access is for a specific regional area.
  - b. '**Choose Agency**' note: this may be pre-selected if your admin access is for a specific.
  - c. '**Choose Job**' if you want a report that shows only data from '*Trainers/SuperUsers*', select '*Trainer*' in this field.

Get the following reports for: Choose Type 🔹 Choose Jurisdiction 👻 Choose Agency 🔹 Choose job 🔹 🔂				Count of the second second		(		(		1
	Get the following reports for:	Choose Type	-	Choose Jurisdiction	•	Choose Agency	•	Choose job	•	0

- 4. On the left select your parameters
  - a. Select which course(s) you'd like a report for.
  - b. Select whether or not you want to schedule the report to come to your email.
  - c. Under '*choose field*', add/remove the fields you want/do not want in your report. I always suggest adding the following to this type of report:
    - i. 'Agencies'
    - ii. 'Certificate Expiration'

1 items selected	•
(GMT-06:00) Central Time	(US and Canada)
Active Employees ①	O Past Employees ①
ichedule Report:	•
Fields:	
Choose Field	-
Brstname	6*
🕫 Lastname	@*
🕫 Email	@° ×
Course	6'
Vignette Type	@° X
Vignette Attempt Pass/Fai	l ⊕° ×
Vignette Attempt Start	©° ×
Vignette Attempt Score	@° ×
Vignette Attempt Story Tit	te @° X

- 5. Click '*save*' in the top right-hand corner.
  - a. If you need the report on demand click the '*download*' button under the private reports' area next to the report you just made.

Report Name	Owner	Created At 🕶	Scheduled	Action
Vignettes Certification Attempt Report	Lauren Schmidt	Sep 07, 2021		🖕 🗾 🖻 💼

### Creating a report to see who is a member of your jurisdiction:

- 1. Click on 'all' in the menu on the left.
- 2. Click on 'members report' and click 'continue'.

		Choose Report Type
NI.		
Iourses	Search Report Types	
Surricula	Courses Report	
ivents	Curricula Report	
icademy	In-Class Training Report	
xams	Live Sessions Report	
/ignettes	Members Report	
Polls	Courses Count Per Course Report	
Samification	Courses Count Per User Report	
Sroups	Courses Count Per Agency Report	
Bundles	Curricula Count Per Curriculum Report	
Credentialing Materials	Curricula Count Per User Report	
Custom	Curricula Count Per Agency Report	
	Agencies Report	
	Courses Reviews Report	
	Badges Report	
	Courses Steps Info Report	
	Curricula Info Report	
	Library Info Report	
	Exams Best Attempts Report	
	Credentialing Materials Report	
	Credits Current Period Report	
	Courses Due Date Report	
	Curricula Due Date Report	

- 3. At the top, select your parameters. One of the 3 fields must be selected for the report to generate.
  - a. '**Choose Jurisdiction**' note: this may be pre-selected if your admin access is for a specific regional area.
  - b. '**Choose Agency**' note: this may be pre-selected if your admin access is for a specific.
  - c. '**Choose Job**' if you want a report that shows only data from '*Trainers/SuperUsers*', select '*Trainer*' in this field.

Get the following reports for:	Choose Type	•	Choose Jurisdiction	•	Choose Agency	•	Choose job	•	0

- 4. On the left select your parameters:
  - a. Select which course(s) you'd like a report for.
  - b. Select whether or not you want to schedule the report to come to your email.
  - c. Under '*choose field*', add/remove the fields you want/do not want in your report.
    - I always suggest adding the following to this type of report:
      - 'Agencies' • Report Options: 1 items selected 👻 (GMT-06:00) Central Time (US and Canada) Active Employees 
        O Past Employees Schedule Report: . Fields: Choose Field Firstname 🖻 Lastname 120 P Course @° X -181 Vignette Type €° X Vignette Attempt Pass/Fail @° X 🕫 Vignette Attempt Start @° X Vignette Attempt Score ⊕° X Vignette Attempt Story Title e° × If a user is associated with multiple org nodes and jobs you can decide whether every association will appear in imgle or separate rows. This setting can be found within the brendering and Securited Table.
- 5. Click '*save*' in the top right-hand corner.
- 6. If you need the report on demand click the '**download**' button under the private reports' area next to the report you just made.

Report Name	Owner	Created At 🗸	Scheduled	Action
Vignettes Certification Attempt Report	Lauren Schmidt	Sep 07, 2021		🍲 🗾 🖻 💼

#### Creating a report to see who has attended a live session:

- 1. Click on 'events' in the menu on the left
- 2. click on '*live sessions report*' and click '*continue*'



- 3. At the top, select your parameters. One of the 3 fields must be selected for the report to generate.
  - a. 'Choose Jurisdiction' note: this may be pre-selected if your admin access is for a specificregional area.
  - b. 'Choose Agency' note: this may be pre-selected ifyour admin access is for a specific.
  - c. 'Choose Job' if you want a report that shows onlydata from 'Trainers/SuperUsers', select 'Trainer' in this field.

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Get the following reports for:	Choose Type	-	Choose Jurisdiction		Choose Agency	-	Choose job	•	0
				_					

- 4. On the left – select your parameters:
  - a. Select which course(s) you'd like a report for.
    - Note: if your live session is associated with an overarching course, you must search the name of the overarching course and then select the 'live session' associated with it.
  - b. Select whether or not you want to schedule the

report to cometo your email.

- c. Under 'choose field', add/remove the fields you want/do not want in your report.
  - I always suggest adding the following to this type of report:

#### 'Agencies'

1 items selected	
(GMT-06:00) Central Time	(US and Canada)
Active Employees ①	○ Past Employees ④
ichedule Report:	•
ields:	
Choose Field	
🕫 Firstname	¢°
🕫 Lastname	@°
🕫 Email	@° ×
D Course	®°
🕏 Vignette Type	®° ×
Vignette Attempt Pass/Fail	$\oplus^{\circ} \times$
Vignette Attempt Start	⊕° ×
Vignette Attempt Score	®° X
Vignette Attempt Story Tit	e di <sup>o</sup> X

e Jurisdictions' and 'Agencies' fields