

Reporting for Managers

There are two primary methods to pull reports regarding your teams' training completions: the **Reports Dashboard** and **Standard Reports**. This guide will review both methods.

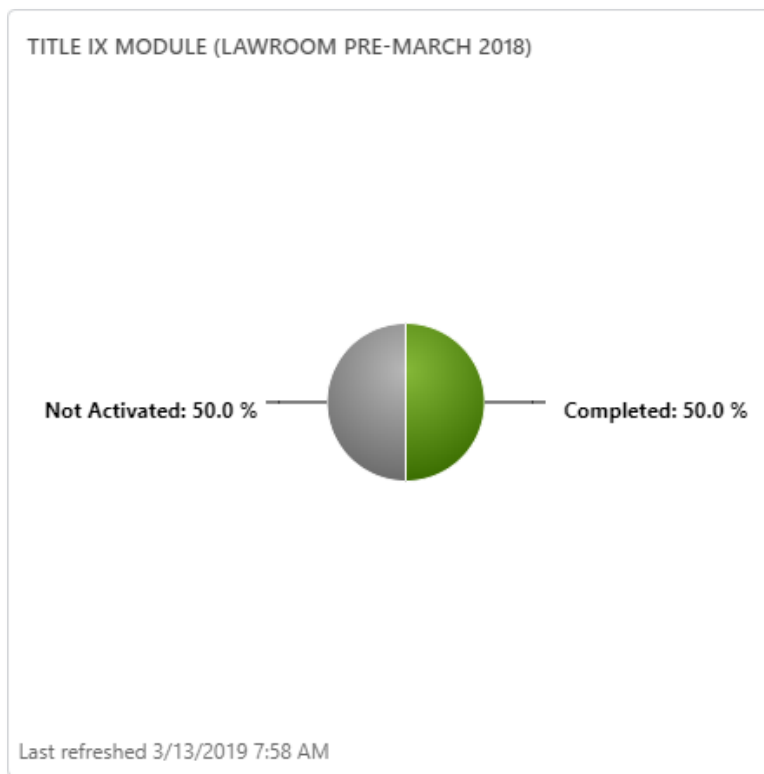
Reports Dashboard


Every manager will have access to the **Reports Dashboard**. You can access your dashboard from the Welcome Page or the Navigation Menu. On the Welcome Page, scroll down to the **Manager Functions** bar and click on **Reports Dashboard**.

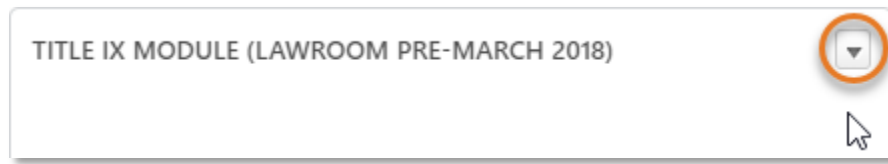


Note: You can also access the **Reports Dashboard** from the Navigation Menu. Click on the Show Navigation Menu icon in the upper right corner of the screen to reveal the Navigation Menu. Select **Reports** to open a submenu and click on **Dashboards**.

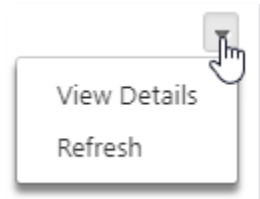
At launch you will have one dashboard available to you, titled **Compliance Training Dashboard**. This dashboard will contain several boxes that displays your teams' completion information for mandatory Title IX, Inclusive Leadership and FERPA training. The first time you visit a dashboard, you will need to wait for the report to run before the data will populate on the screen.



When you hover your mouse over a box, a menu button () will appear at the top of the box.




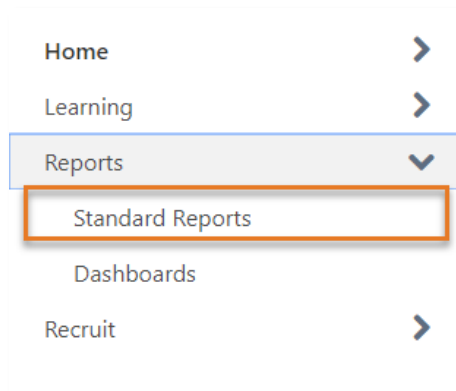
Click the button to reveal the menu.



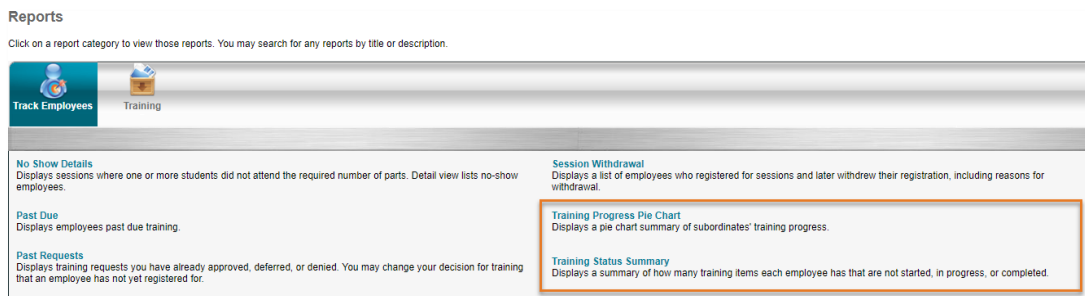
Select **Refresh** to run the report and display the most current data. Select **View Details** to launch a pop-up with that display additional details about the report.

Standard Reports

To access **Standard Reports**, click on the Show Navigation Menu icon () in the upper right corner of the screen to reveal the Navigation Menu. Select **Reports** to open a submenu and click on **Standard Reports**.

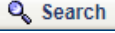


From the **Standard Reports** page, you can run reports on your direct reports' training completions. There are two reports you should be familiar with: the **Training Status Summary Report** and the **Training Progress Pie Chart**.

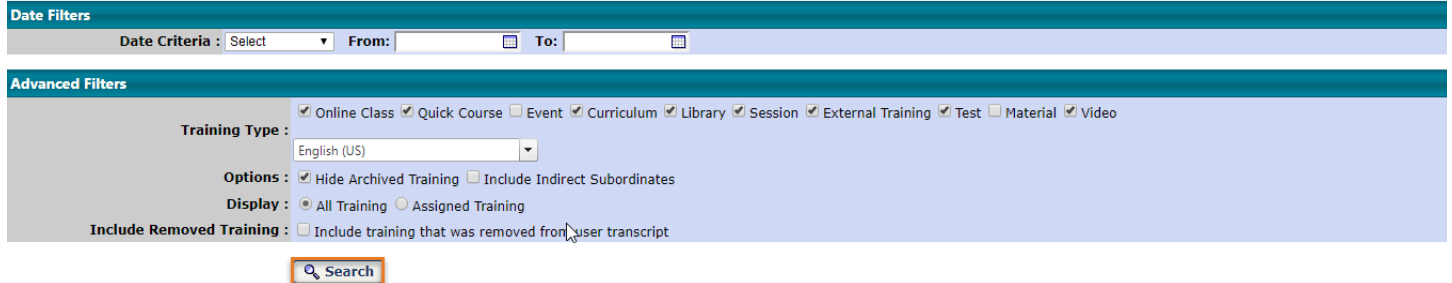


Training Status Summary Report

The **Training Status Summary Report** displays a summary of how many training items each employee has on their transcript (items for which they voluntarily registered or items assigned to them) that are not started, in progress, or completed.

Click on **Training Status Summary Report** to access the report. On the resulting page, set the parameters for your search and click the search button (). If you want to see all training items and their statuses for your team, you do not need to set any parameters.


View training progress information for your subordinates. The date filters below refer to the date the training was requested/assigned.

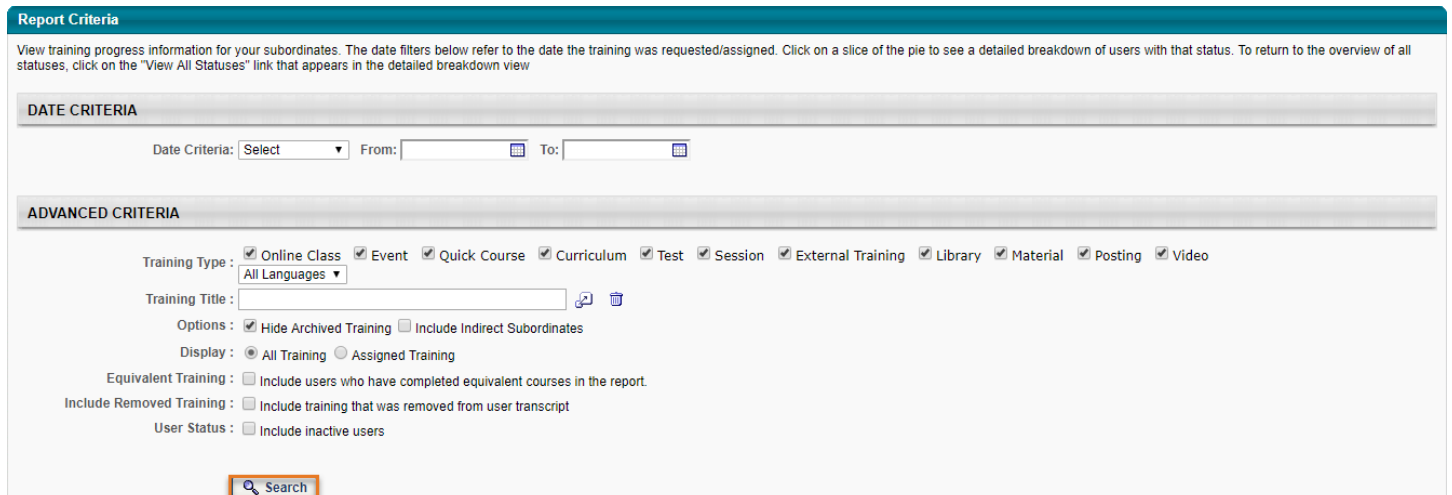


The data will display on the screen. If you would like to sort the data, you can export it to Microsoft Excel.

Training Progress Pie Chart

The **Training Progress Pie Chart** displays a pie chart summary of subordinates' training progress. This report allows you to select a specific training item and view the associated status for each direct report.

Click on **Training Progress Pie Chart** to access the report. On the resulting page, set the parameters for your search and click the search button ().



The data will display on the screen. If you would like to sort the data, you can export it to Microsoft Excel.