Chapter 12

eLearning Manager Reports

Chapter Scope

This section describes working with the four *eLearning Manager* reports: the certification report, the training impact report, the training report and the competency scores report.

The section topics are as follows:

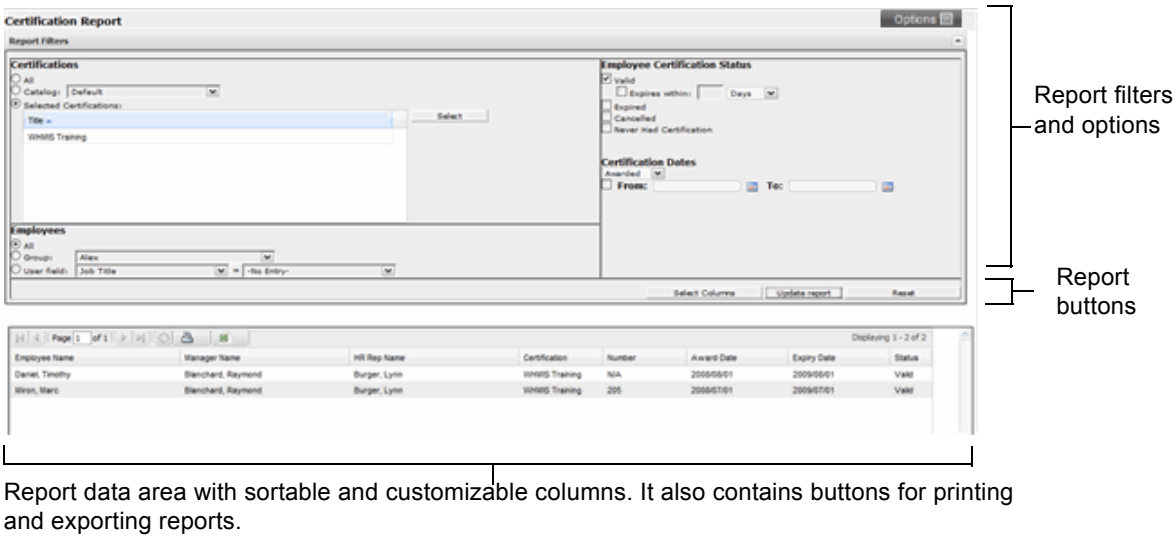
About eLearning Manager Reports

The following table describes the *eLearning Manager* reports available to users based on their role, and it provides an example of how you might use the reports.

Table 12-1 eLearning Manager Reports

Report Title	Users with access	Description	Example
Training Report	• Learning Admins • Super Users • Learning & Development Specialists	This report displays a student's course results for a specific learning unit. For more information, see *"About Training Reports" on page 165*.	You can use this report to provide insight into the performance of an employee, or employees, in a learning unit of your choice.
Training Impact Report	• Learning Admins • Super Users • Learning & Development Specialists	This report displays how successful (or unsuccessful) a training course was on improving an employee's competency scores. For more information, see *"About Training Impact Reports" on page 166*.	You can use this report to determine which courses provide the most value to your organization. Conversely, courses that do not directly improve your employee's performance could be scaled back or dropped entirely to save money for your company.
Certification Report	• Learning Admins • Super Users • Learning & Development Specialists	This report displays the certification status for employees. Specifically, you can use it to identify what certifications have expired, which certifications will expire in the near future, and so forth. For more information, see *"About Certification Reports" on page 168*.	You can use this report to monitor the status of your employee's certifications. For example, if your company requires that all employees are CPR certified, you can use this report to determine which employees have yet to complete their certification, and which employees need to recertify.
Competency Scores Report	• Super Users • Learning & Development Specialists	This report displays scores for various competencies you select. For more information, see *"About Competency Scores Reports" on page 168*.	You can use this report to display scores for various competencies, and compare the results to see changes over time.

The following example report is a certification report. Although each report has unique filtering options, they all share the same general layout described below:



The report filters and options appear in the top portion of the screen. Once the **Generate Report** button is clicked, the report data appears in the lower part of the screen.

In addition, you can customize the reports, print reports, and export reports to *Microsoft Excel*. For more information, see any of the following:

- *"Customizing Report Columns" on page 177*
- *"Sorting Report Columns" on page 178*
- *"Printing Reports" on page 178*
- *"Exporting Reports" on page 179*
- *"Hiding Report Filters" on page 180*

NOTE: Inactive employees will appear in reports.

About Training Reports

Training reports display course results for a learning unit or units. You can use this report to view all of your learning units, all learning units from a specific catalog, or results from selected learning units.

By default, only learning units with a status of "Final" will be available for this report. However, if you select specific learning units for the report, there is also an option to include archived learning units. You can view up to 50 learning units in the report. Finally, inactive employees will appear in this report.

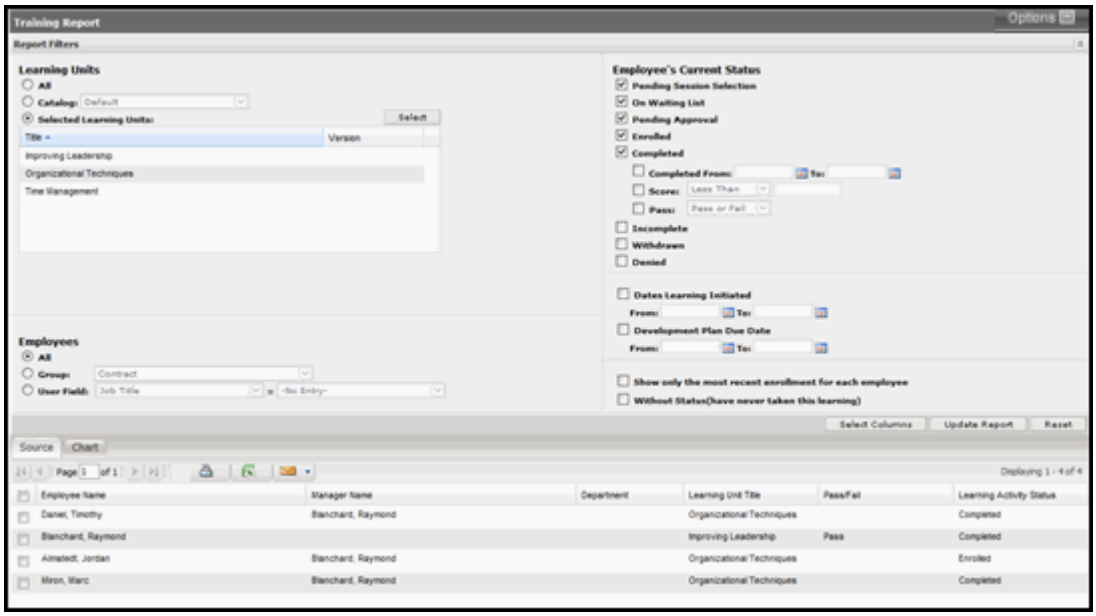
You also have several filtering options available with this report. For example, you can filter the students associated with the learning unit or units by their status, such as “enrolled,” “completed,” and/or “withdrawn.” You can also filter based on results and/or dates.

In addition to viewing the raw report data, you can also view a bar chart that shows the count of students with the selected statuses for the selected learning unit(s).

If you choose to view the Training Report for a single Learning Unit, a summary of the learning unit will appear. The summary contains information such as the title and description of the learning unit, as well as summarized scoring information. The summary only appears when you select a single learning unit.

The Training report also allows you to send notifications. You can send notifications to one or several employees at once, or you can send notifications to the next approver.

An example of a training report appears below:



Learning Administrators, Super Users, and Learning & Development Specialists can access Training reports. For more information, see *“Viewing a Training Report” on page 169*.

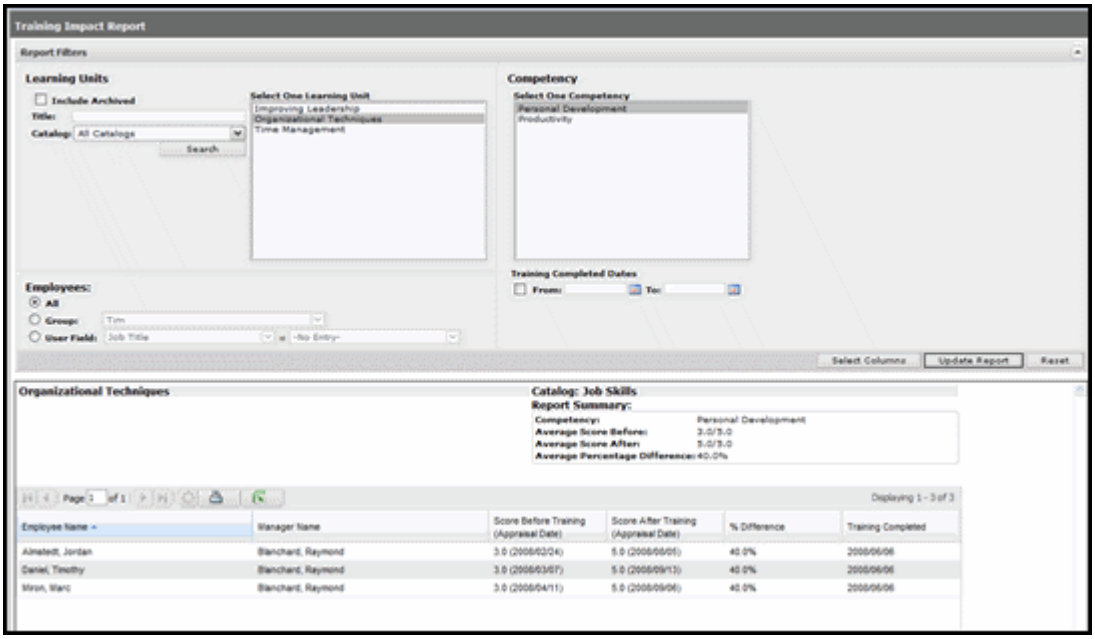
About Training Impact Reports

This report displays how successful (or unsuccessful) a training course was on improving an employee’s competency scores. Note that the training must be associated with specific competencies and that the students must have been evaluated on the competency before and

after completing the training. Furthermore, only employees with score data from a scheduled, anniversary, or interim eAppraisal or from an eSuccession process will be included in the report results.

For example, suppose an employee is evaluated on a competency called “Personal Development.” In 2006, the employee scored an 8 out of 10 on this competency before attending any training. In 2007, the same employee completed training in a “Moving past conflict” course that was associated with the “Personal Development” competency. In 2008, the employee was evaluated on the same competency for a second time. The Training Impact report will give you an indication of how successful the training was in improving the employee’s score in the associated competency. If the employees’ scores tend to improve after training, it indicates that the training is probably worthwhile. On the other hand, if the employees’ scores stay level or even drop marginally, perhaps the training is not as effective as it could be.

An example of a Training Impact report appears below:



As the example report indicates above, the **% Difference** column shows that the training employees received helped to increase their performance by 40% for the “Personal Development” competency.

Note that the **Report Summary** area gives you a quick summary of the report results. These results present an average score before training, an average score after training, and a percentage difference result. If the scores in the results use different scales, the averages will be expressed as percentages.

If an employee has received a score on the same competency more than once, only the most recent score is used for the **Average Score Before** value. Similarly, only the oldest score that is still after the training is applicable for the **Average Score After** value.

For information on viewing this report, see *“Viewing a Training Impact Report” on page 171*.

About Certification Reports

This report displays the certification status for employees. Specifically, you can use it to identify what certifications have expired, which certifications will expire in the near future, and so forth.

In this report, as with all *eLearning Manager* reports, the report filters are located at the top of the screen, and the report data appears below the filters.

By default, only certifications with a status of "Final" will be available for this report. However, if you select specific certifications for the report, there is also an option to include archived certifications. You can view up to 50 certifications in the report. Finally, inactive employees will appear in the certification report.

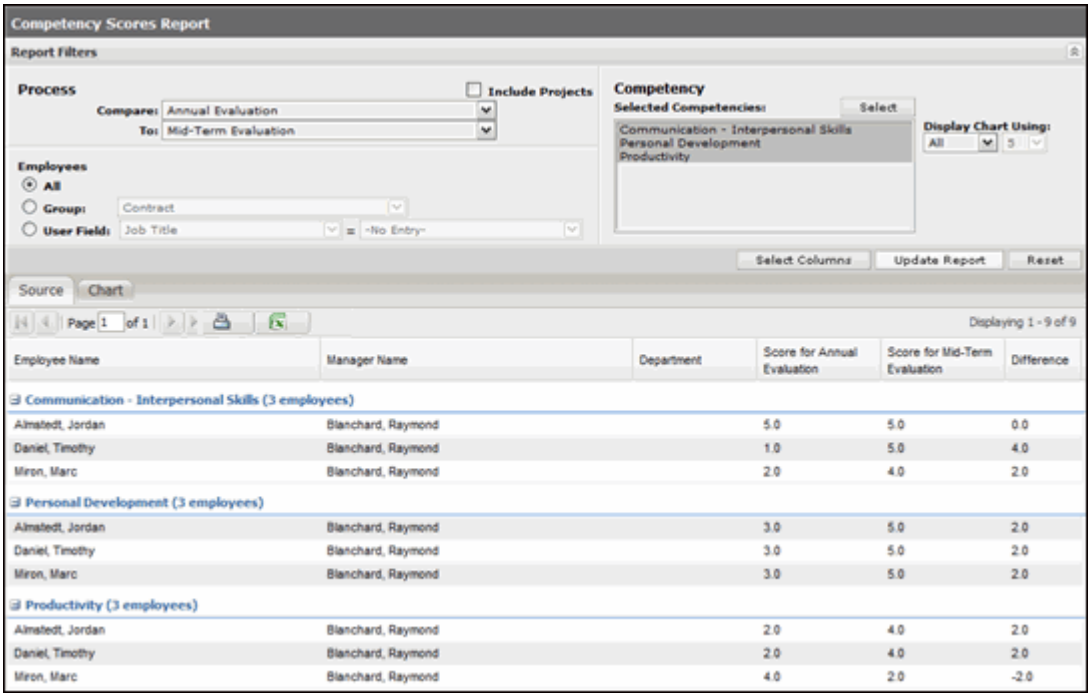
To view this report, see *"Viewing a Certification Report" on page 173*.

About Competency Scores Reports

The Competency Scores report displays scores for various competencies. You can use this report to display scores for various competencies, and compare the results to see changes over time.

You must select at least once competency for this report. In addition, if you compare two processes, only those competencies that appear in both processes will be available.

An example of the Competency Scores report appears below:



These reports are visible to Super Users and Learning & Development Specialists. For more information, see *"Viewing a Competency Scores Report" on page 175*.

Viewing a Training Report

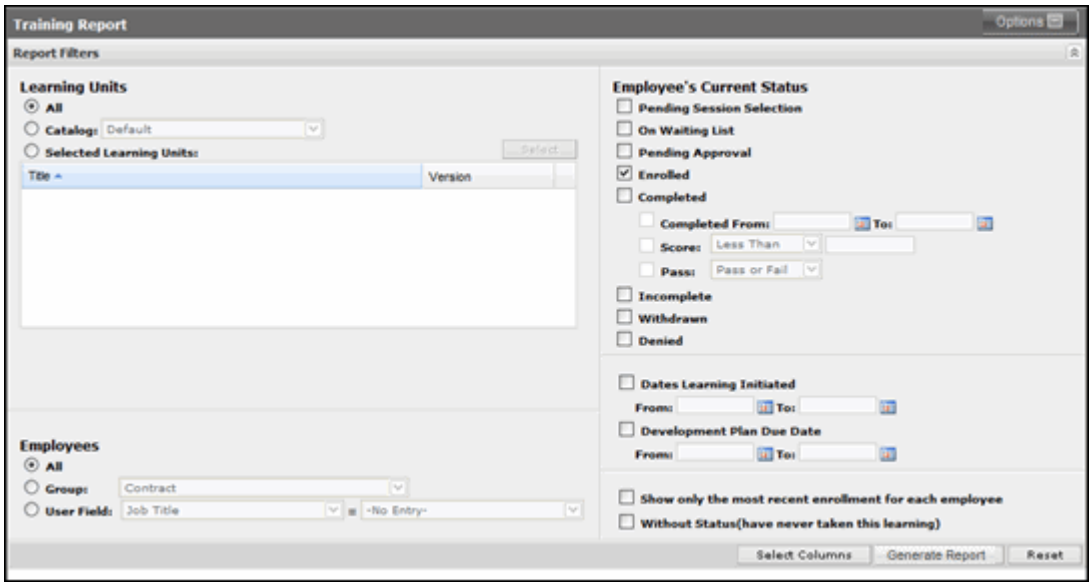
The Training report displays course status and results for a learning unit or units. You can use this report to view all of your learning units, all learning units from a specific catalog, or results from selected learning units. In addition, you can filter the report based on the employee's learning activity status for the report.

In addition to viewing the raw data in the report, you can view a chart of the data, which displays the status (enrolled, completed, and so forth) for the learning units you have selected.

By default, only learning units with a status of "Final" are available for the report. However, you have the option to include "Archived" learning units.

To View a Training Report

1 From the **Learning Control Center**, click the **Reports** link, and then click **Training Report**. The report appears in a new window.



2 In the **Learning Units** area, do one of the following:

- To view a training report for all learning units with a status of "Final," click the **All** radio button.
- To view a training report for all learning units from a specific catalog, click the **Catalog** radio button, and then select a catalog from the drop-down list. Note that the catalogs must not be archived to appear in the list of catalogs.
- To view a training report for one or more learning units of your choice, click the **Selected Learning Units** radio button, then click the **Select** button. The **Select Learning Units** window

appears. By default, only those learning units with a status of “Final” will appear in the **Available** area, but you can select the **Include Archived** check box if you want to include archived learning units in your search. Enter a few letters in the **Title** field, then, if required, select a catalog from the **Catalog** drop-down list, and then click the **Search** button. The learning units matching your choices appear in the **Available** area. Select the learning units you want to add and then click the **Add** button. Then click the **OK** button.

3 In the **Employee’s Current Status** area, select any of the check boxes/complete the fields as required.

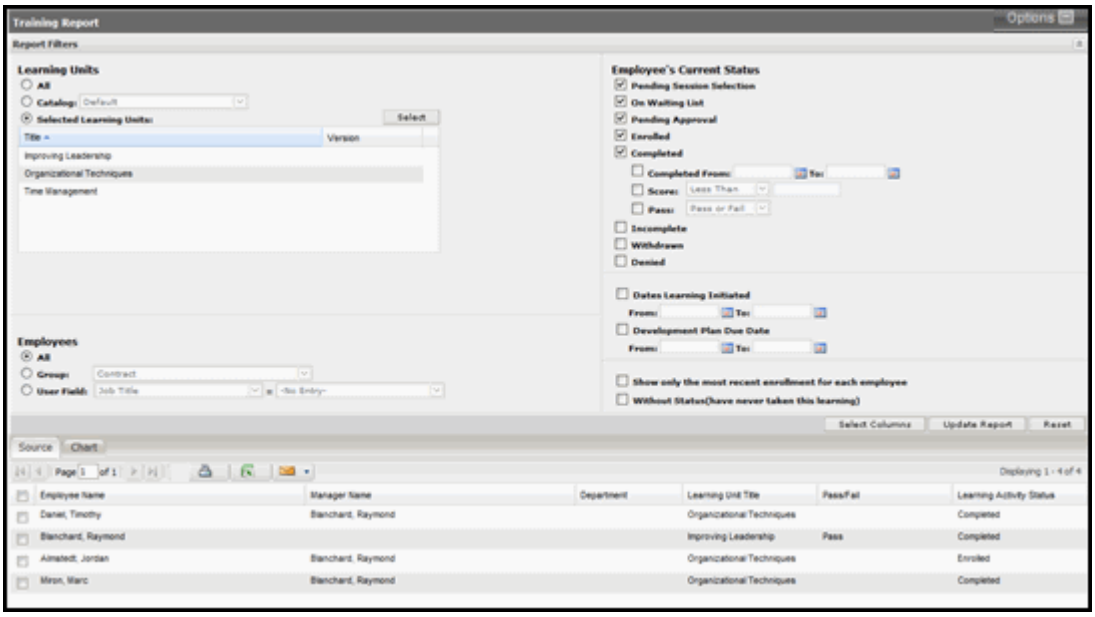
4 In the **Employees** area, do one of the following:

- To view a training report for all of the employees in the User Center, click the **All** radio button.
- To view a training report for a group of employees, click the **Group** radio button, and then select the group from the drop-down list.
- To view a training report for specific employees by a user field, such as Job Code, click the **User Field** radio button, then select **Job Code** from the drop-down list, and then select a value from the adjacent drop-down list.

5 (Optional) If you want to customize the columns in the report, click the **Select Columns** button. For more information, see *“Customizing Report Columns” on page 177*.

6 Click the **Generate Report** button.

Your report settings are saved, and the report data appears in the lower part of the window with the **Source** tab selected.



7 (Optional) If you want to send a notification to an employee (or several employees) or the next approver, select the check box next to the employee(s), then click the envelope icon ✉, then select either **Send email notification to employee** or **Send email notification to next approver**, then configure the notification email as required, and then click the **OK** button.

8 (Optional) Click the **Chart** tab to view a count of the statuses in a bar chart format.

Only the statuses ("Under Approval," "Enrolled," and so forth) you selected in step 3 appear on the chart.

9 (Optional) Do any of the following:

- Customize the report columns. For more information, see *"Customizing Report Columns" on page 177*.
- Sort the report columns. For more information, see *"Sorting Report Columns" on page 178*.
- Print the report. For more information, see *"Printing Reports" on page 178*.
- Export the report to *Microsoft Excel*. For more information, see *"Exporting Reports" on page 179*.
- Hide the report filters so you can view the report data using the entire screen. For more information, see *"Hiding Report Filters" on page 180*.

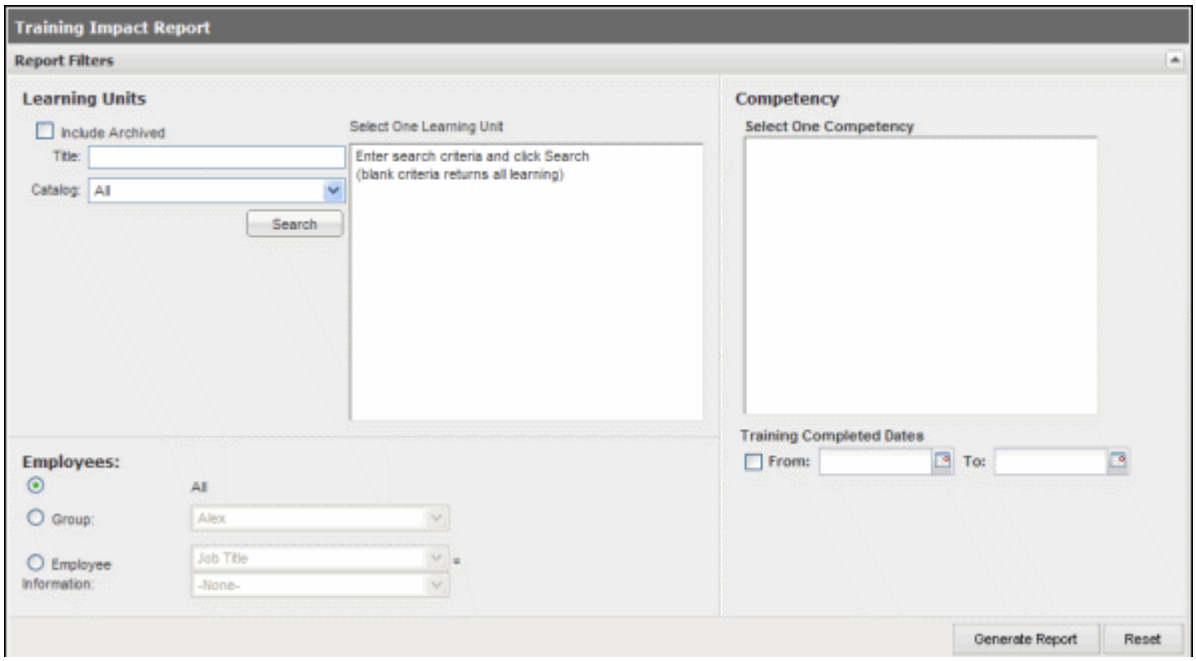
Viewing a Training Impact Report

This report displays how successful (or unsuccessful) a training course was on improving an employee's competency scores. Note that Learning Units must have competencies associated with them or they will not be available for this report.

To View a Training Impact Report

1 From the **Learning Control Center**, click the **Reports** link, and then click **Training Impact Report**.

The report appears in a new window.



2 (Optional) Select the **Include Archived** check box if you want to include archived catalogs in your search.

3 (Optional) In the **Title** field, enter the title of the Learning Unit.

4 (Optional) In the **Catalog** drop-down list, select the catalog that contains the Learning Unit you want to view.

5 Click the **Search** button.

Learning Units that have associated competencies appear.

6 In the **Select One Learning Unit** area, select a Learning Unit.

Competencies associated with the Learning Unit appear.

7 In the **Select One Competency** area, select a competency.

8 (Optional) Select the **From** check box and then use the calendar icons to enter **From** and **To** dates for the date the learning was completed.

9 In the **Employees** area, do one of the following:

- To view a training impact report for all employees, click the **All** radio button.
- To view a training impact report for all employees from a specific group, click the **Group** radio button, and then select a group from the drop-down list.
- To view a training impact report for employees based on a user field, click the **Employee Information** radio button, then select a field from the drop-down list, and then select a value in the adjacent drop-down list.

10 (Optional) Click the **Select Columns** button to choose the columns you want displayed in the report.

For more information, see *"Customizing Report Columns" on page 177*.

NOTE: The report always displays the **Score Before Training (Appraisal Date)**, **Score After Training (Appraisal Date)**, **% Difference**, and **Training Completed** columns.

11 Click the **Generate Report** button.

Your report settings are saved, and the report appears at the bottom of the screen.

12 (Optional) Do any of the following:

- Customize the report columns. For more information, see *"Customizing Report Columns" on page 177*.
- Sort the report columns. For more information, see *"Sorting Report Columns" on page 178*.
- Print the report. For more information, see *"Printing Reports" on page 178*.
- Export the report to *Microsoft Excel*. For more information, see *"Exporting Reports" on page 179*.
- Hide the report filters so you can view the report data using the entire screen. For more information, see *"Hiding Report Filters" on page 180*.

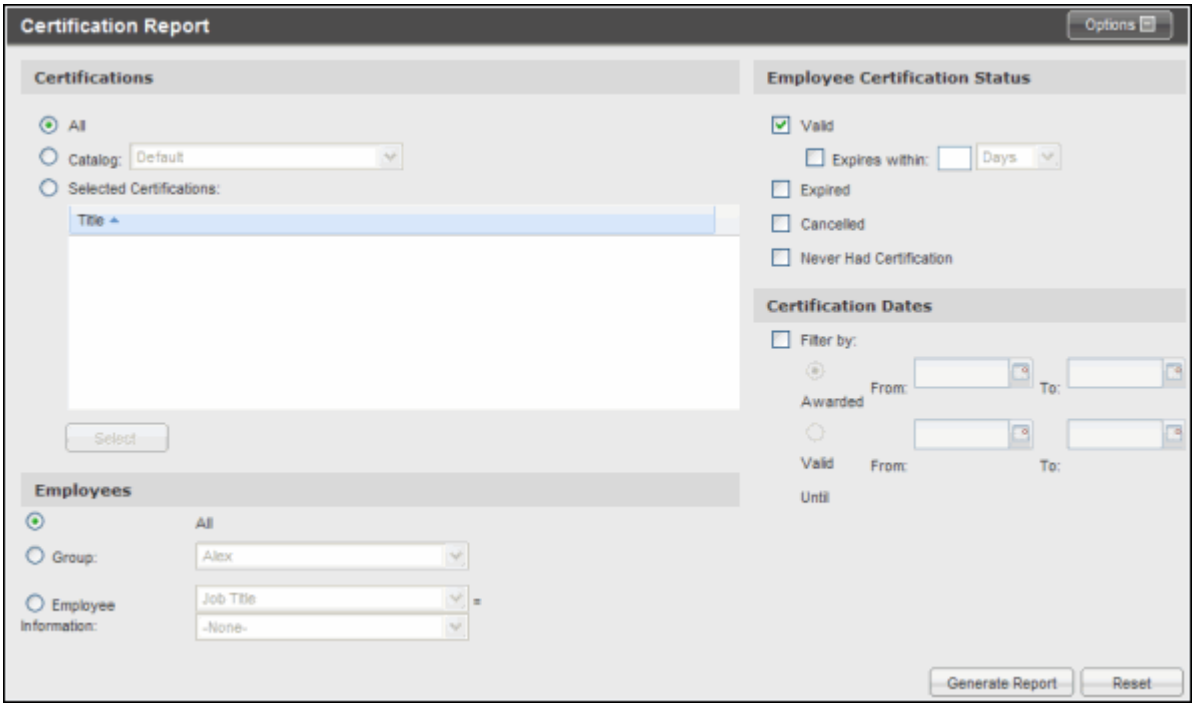
Viewing a Certification Report

This report displays the certification status for employees. Specifically, you can use it to identify which certifications have expired, which certifications will expire in the near future, and which employees are not certified.

To View a Certification Report

1 From the **Learning Control Center**, click the **Reports** link, and then click **Certification Report**.

The report appears in a new window.



2 In the **Certifications** area, do one of the following:

- To view a certification report for all of the employees in the User Center, click the **All** radio button.
- To view a certification report for all certifications in a catalog, click the **Catalog** radio button, and then select the catalog from the drop-down list.
- To view a certification report for a certification of your choice, click the **Selected Certifications** radio button, then click the **Select** button, then click the **Search** button, then select the certification from the **Available** area, then click the **Add** button, and then click the **OK** button. By default, only those certifications with a status of “Final” appear in the list, but you can select the **Include Archived** check box to also include archived certifications.

3 In the **Employee Certification Status** area, configure the check boxes and drop-down lists as required.

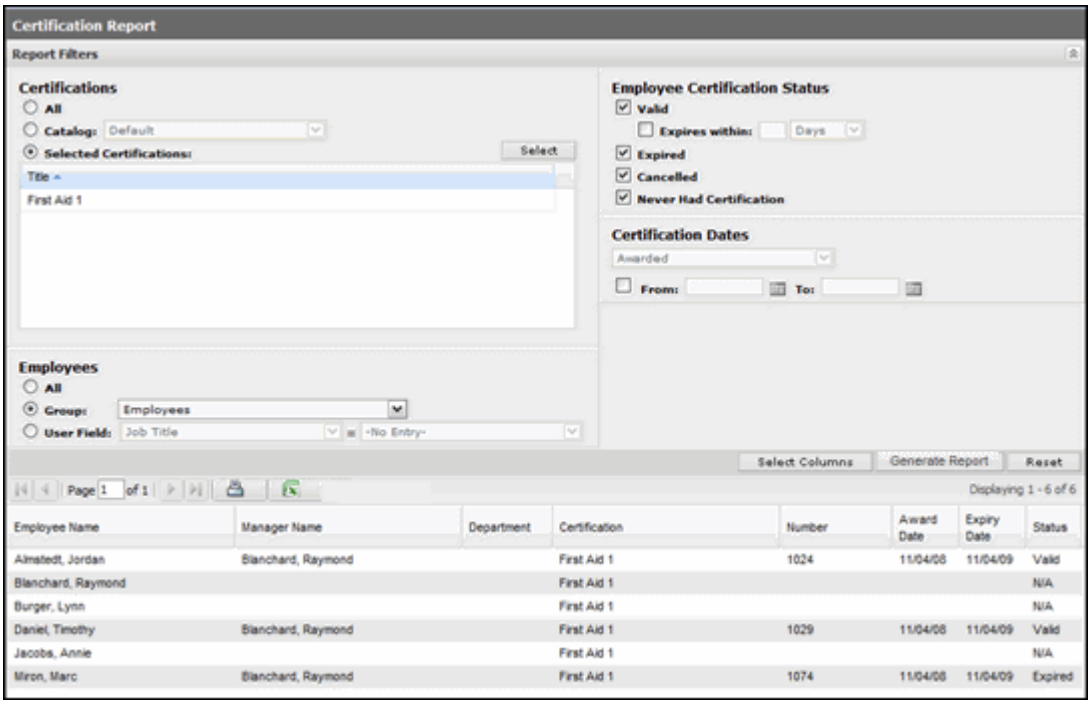
4 In the **Employees** area, do one of the following:

- To view a certification report for all employees, click the **All** radio button.
- To view a certification report for all employees from a specific group, click the **Group** radio button, and then select a group from the drop-down list.
- To view a certification report for employees based on a user field, click the **Employee Information** radio button, then select a field from the drop-down list, and then select a value in the adjacent drop-down list.

5 (Optional) If you want to customize the columns in the report, click the **Select Columns** button. For more information, see *"Customizing Report Columns" on page 177*.

6 Click the **Generate Report** button.

Your report settings are saved, and the report appears at the bottom of the screen.



7 (Optional) Do any of the following:

- Customize the report columns. For more information, see *"Customizing Report Columns" on page 177*.
- Sort the report columns. For more information, see *"Sorting Report Columns" on page 178*.
- Print the report. For more information, see *"Printing Reports" on page 178*.
- Export the report to *Microsoft Excel*. For more information, see *"Exporting Reports" on page 179*.
- Hide the report filters so you can view the report data using the entire screen. For more information, see *"Hiding Report Filters" on page 180*.

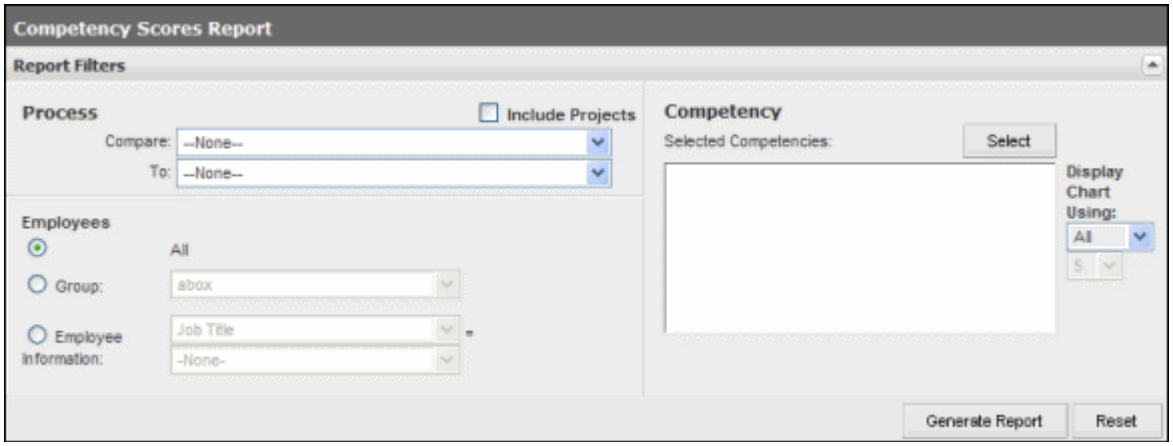
Viewing a Competency Scores Report

The Competency Scores report displays scores for various competencies. This report is designed to help Learning & Development Specialists determine who needs what kind of training.

To View a Competency Scores Report

1 From the **Learning Control Center**, click the **Reports** link, and then click **Competency Scores Report**.

The report appears in a new window.



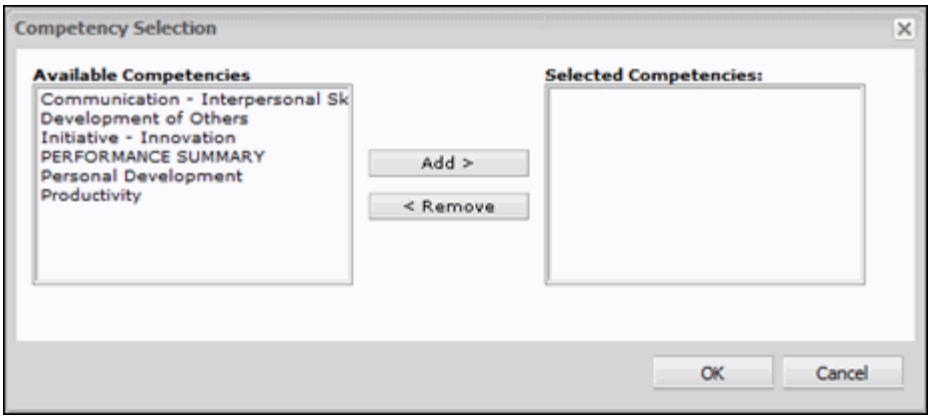
2 (Optional) Select the **Include Projects** check box if you want to include project processes in the report.

3 In the **Process** area, select an eAppraisal project or process, or an eSuccession talent assessment, from the **Compare** drop-down list.

4 (Optional) If you want to compare the results to another project or process, select one from the **To** drop-down list.

5 In the **Competency** area, click the **Select** button.

The **Competency Selection** window displays. Note that if you selected a second process in step 4, only competencies that appear in both projects or processes will appear in the **Available Competencies** field.



6 In the **Available Competencies** field, select the competency, or competencies, you want to view in the report, then click the **Add** button, and then click the **OK** button.

7 In the **Employees** area, do one of the following:

- To view a report for all employees, click the **All** radio button.
- To view a report for all employees from a specific group, click the **Group** radio button, and then select a group from the drop-down list.
- To view a report for employees based on a user field, click the **Employee Information** radio button, then select a field from the drop-down list, and then select a value in the adjacent drop-down list.

8 Click the **Generate Report** button.

Your report settings are saved, and the report appears at the bottom of the screen.

If you chose to view a single process, a single **Score for {process name}** column appears in the report. If you chose to compare a project/process to another project/process, an additional two columns (**Score for {process name}** and **Difference**) appear in the report.

9 (Optional) Click the **Chart** tab to view the report in a bar chart format. Then, if required, change how much information is shown in the chart using the drop-down lists in the **Display Chart Using** area.

10 (Optional) Do any of the following:

- Customize the report columns. For more information, see *"Customizing Report Columns" on page 177*.
- Sort the report columns. For more information, see *"Sorting Report Columns" on page 178*.
- Print the report. For more information, see *"Printing Reports" on page 178*.
- Export the report to *Microsoft Excel*. For more information, see *"Exporting Reports" on page 179*.
- Hide the report filters so you can view the report data using the entire screen. For more information, see *"Hiding Report Filters" on page 180*.

Customizing Report Columns

By default, certain columns, such as **Employee Name**, **Manager Name**, and **Department**, are displayed when you view a report. You can customize which columns are displayed in a report at any time, however.

For example, suppose you want to view an anonymous report that only contains the employee ID and not the employee's name, manager's name, and so forth. You can customize the columns of the report by removing all the unwanted columns so that only the employee ID is displayed.

Note, however, that only the Training report's columns are completely customizable. The Training report allows you to customize the columns to show additional columns from the learning unit such as the Learning Activity Status, Cost, and so forth. For the remaining reports, you can only customize employee filter columns, such as the Employee ID, Job Code, and so forth.

When you customize the columns and update the report, your changes will be saved. That is, the next time you view the report, the last changes you made will be retained. Click the **Reset** button if you want to reset the report to its default settings.

To Customize Report Columns

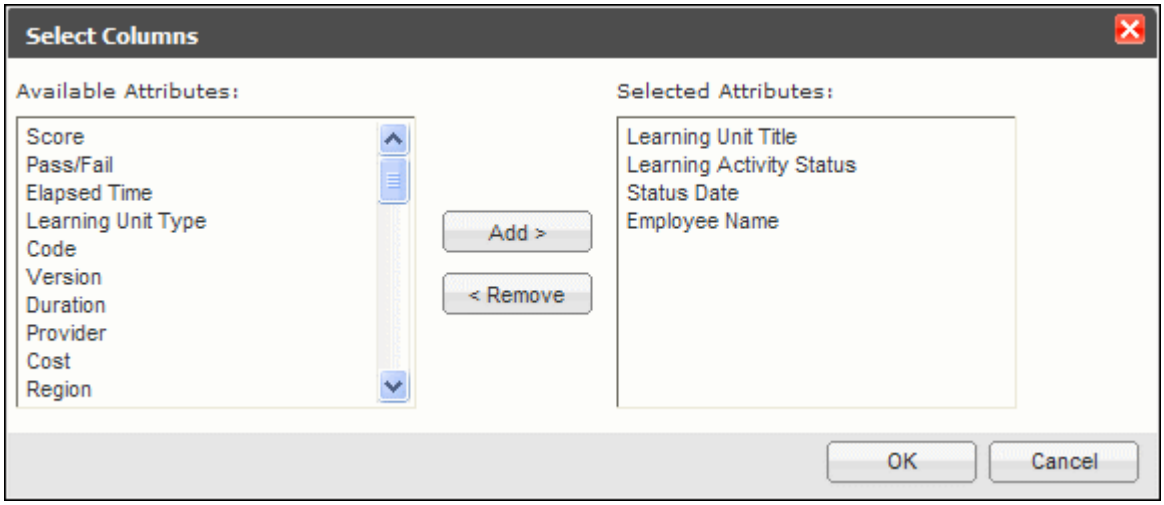
1 View a report. For more information, see any of the following:

- *"Viewing a Training Report" on page 169*
- *"Viewing a Training Impact Report" on page 171*
- *"Viewing a Certification Report" on page 173*
- *"Viewing a Competency Scores Report" on page 175*

The report appears in a new window.

2 Click the **Select Columns** button.

The **Select Columns** window displays showing the available columns and the selected columns.



3 In the **Available Attributes** area, select the columns you want to add to the report, and then click the **Add >** button.

Tip: Use the CTRL or SHIFT keys to select multiple individual or multiple adjacent items from the list.

4 (Optional) In the **Selected Attributes** area, select the columns you want to remove from the report, and then click the **< Remove** button.

5 Click the **OK** button.

6 Click the **Generate Report** button to view your changes.

Sorting Report Columns

With *eLearning Manager* reports, you can sort any column in ascending or descending order. For example, suppose you have a certification report showing certification data for several hundred employees. You can sort on the status column to display the employees with a status of "expired" at the top of the report.

To Sort Report Columns

1 View a report. For more information, see any of the following:

- *"Viewing a Training Report" on page 169*
- *"Viewing a Training Impact Report" on page 171*
- *"Viewing a Certification Report" on page 173*
- *"Viewing a Competency Scores Report" on page 175*

The report appears in a new window.

2 Click the column header you want to sort.

An ascending sort arrow appears to indicate the order of the sorting.

3 (Optional) Click the column header again to sort in the opposite direction.

A descending sort arrow indicates the new order of the sorting.

Printing Reports

You can print all reports using your web browser's print feature. You can print up to 5000 records.

To Print a Report

1 View a report. For more information, see any of the following:
   - *"Viewing a Training Report" on page 169*
   - *"Viewing a Training Impact Report" on page 171*
   - *"Viewing a Certification Report" on page 173*
   - *"Viewing a Competency Scores Report" on page 175*

   The report appears in a new window.

2 Click the printer icon .

   The report appears in a new window ready for you to print.

3 Print the report using your web browser's print feature.

Exporting Reports

When you export your reports, the first worksheet displayed in your workbook contains information such as the report title, the date it was generated, and so forth; subsequent worksheets contain the report data. Text formatting such as bold and underlines are exported but images are not. You can export up to 5000 records.

To Export a Report

1 View a report. For more information, see any of the following:
   - *"Viewing a Training Report" on page 169*
   - *"Viewing a Training Impact Report" on page 171*
   - *"Viewing a Certification Report" on page 173*
   - *"Viewing a Competency Scores Report" on page 175*

   The report appears in a new window.

2 Click the export icon .

3 Do either of the following:
   - If you are using Internet Explorer, click the **Open** button.
   - If you are using Firefox, click the **Open With** radio button, and then click the **OK** button.

   The report appears in your spreadsheet program. Note that the first worksheet of the spreadsheet details the title of the report, any filters applied, and so forth. The report data appears on the second worksheet.

Hiding Report Filters

You can hide the filters area of the report window, which allows you to view all of the report data using the full screen. Consider hiding the report filters if you have a lot of data on the screen.

To Hide Report Filters

1. View a report. For more information, see any of the following:
   - *"Viewing a Training Report" on page 169*
   - *"Viewing a Training Impact Report" on page 171*
   - *"Viewing a Certification Report" on page 173*
   - *"Viewing a Competency Scores Report" on page 175*

   The report appears in a new window.

2. Configure the report filters as required.

3. Depending on which report your open, click either the **Options** button or the arrow to hide or expand the report filters.

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