Session 6: Reports – Quick Reference Guide

Generate Reports Overview

TargetSolutions *Generate Reports* Application easily allows Platform Managers to run reports on completed assignments, incomplete assignments, users, credentials, and components. Within this application, administrators are able to save reports, recreate popular reports, specify output columns and much more.

Report Types

Platform Managers have access to several different types of reports within the *Generate Reports* application.

The type of report generated will determine the information tracked and displayed to the Platform Manager.

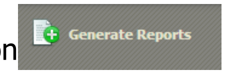
To select a report type, Platform Managers can choose from a list of reports located within the **Generate New Report** column inside of the *Generate Reports* application.

The **Generate New Report** column includes the following: Completions, Incomplete Assignments, Users, No Completions, No Assignments, Aggregate Completions, Credentials, Credentials Exception, Credentials Summary, Component Completions, and Aggregate Components.

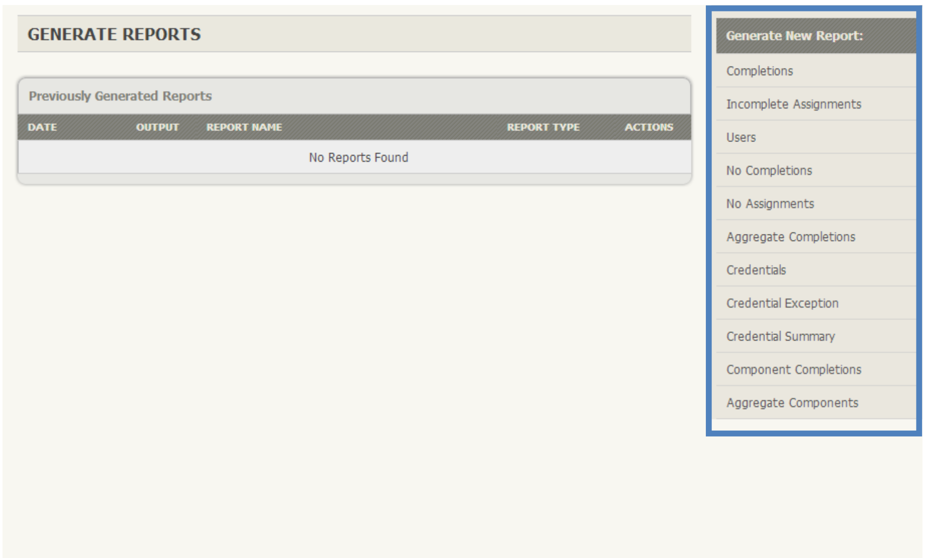
Report Type	Related Application(s)	Information Tracked
Completions	All Assignments (Courses & Activities)	Completed assignment data and copies of certificates of completions/attachments
Incomplete Assignments	All Assignments (Courses & Activities)	Incomplete (pending) assignment data
Users	Manage Users (Profile)	Organizational Categories, Profile Information, and Functional Access
No Assignments	All Assignments (Courses & Activities)	Users with no assignments completed within a specific period of time
No Completions	All Assignments (Courses & Activities)	Users with no course or activity completions during a specific period of time
Aggregate Completions	All Assignments (Courses & Activities)	Displays a total number of assignments and hours completed during a specified time frame
Credentials	Managing Credentials	Specific information on credentials over a designated period of time
Credentials Summary	Managing Credentials	Users' progress toward completing one specified credential
Credentials Exception	Managing Credentials	Users for whom the specified credential has expired or users who are not assigned to the specified credential
Component Completions	Activities Builder	Activity completions based on filtering by reportable components
Aggregate Components	Activities Builder	Total number of times components have been recorded within an Activity completion

How to generate a new report

To access the *Generate Reports* application, please enter the Administration tab.

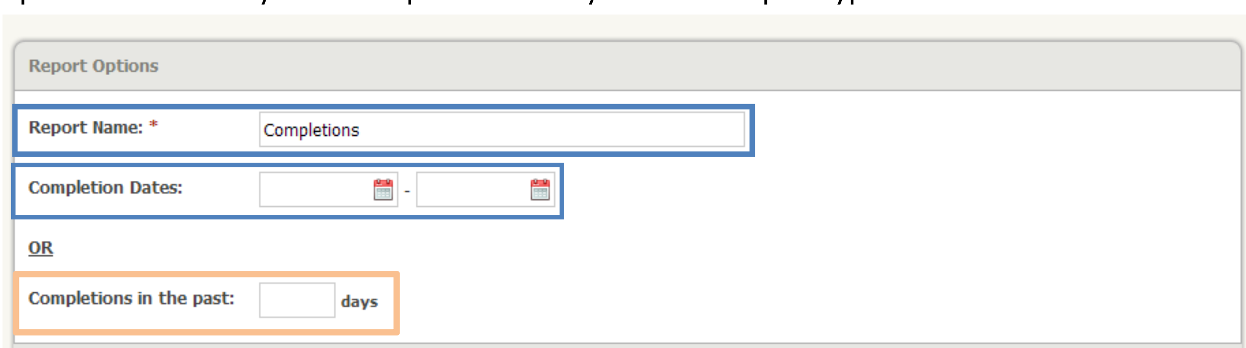
1. Click on 

2. Once inside the *Generate Reports* main page, select the type of report that you would like to generate from the **Generate New Report** column. For this example, we will select **Completions**.

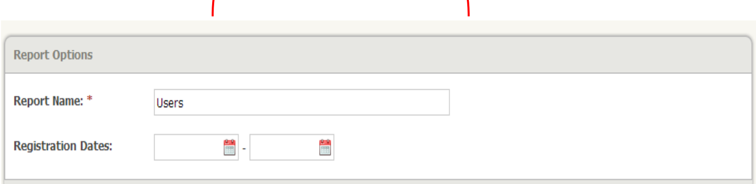


3. Once inside the report, utilize the **Report Options** field to input a title and select dates to run the report on.

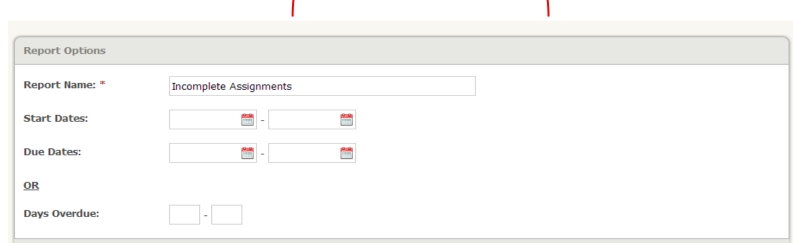
   Other options may be available, such a generating the report on completions that occurred within a past number of days. These options will vary based on report type.



Example: **Report Options** for **Users** report type

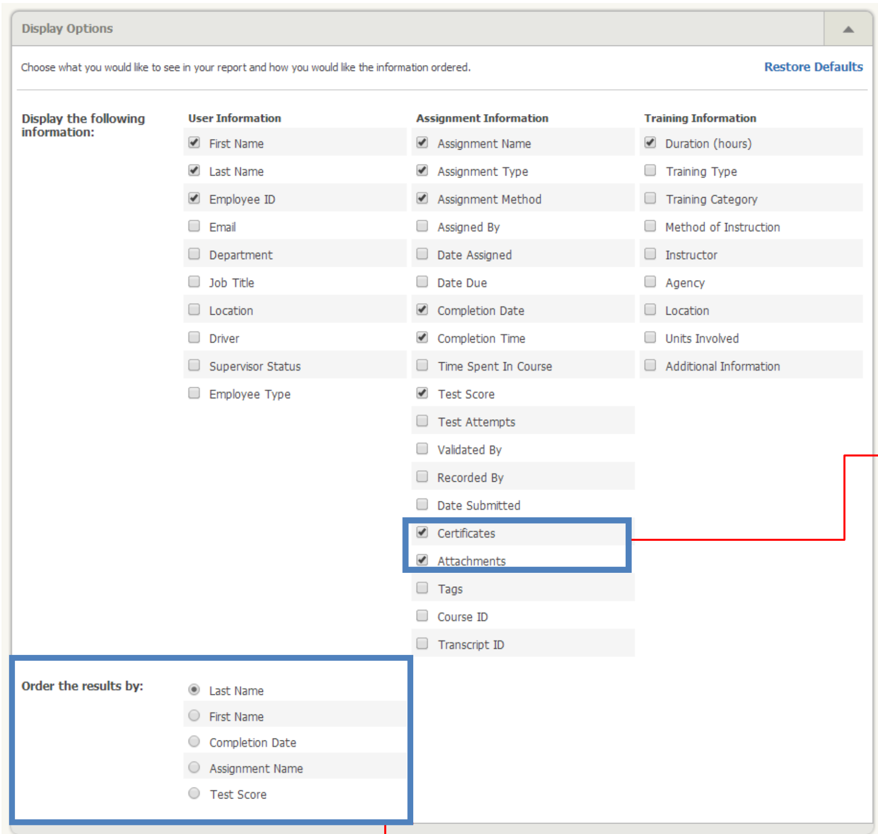


Example: **Report Options** for **Incomplete Assignments** report type



4. Utilize the **Display Options** field to select **User Information**, **Assignment Information**, and/or **Training Information** to be viewed within the completed report.

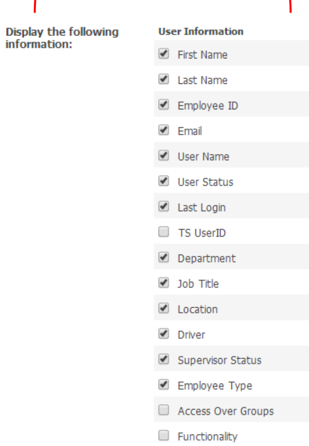
   The **Display Options** field will include different options based on report type. The image below is for a **Completions** report type.



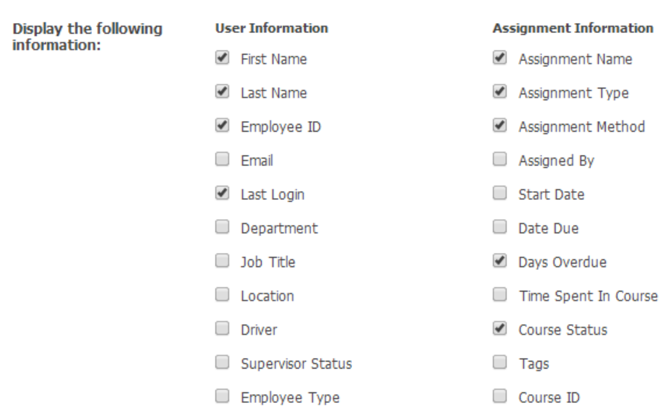
Make sure to check the "**Certificates**" or "**Attachments**" boxes if you want the ability to view and print certificates or attachments.

Utilize the "**Order the results by**" section to select how you would like your results organized.

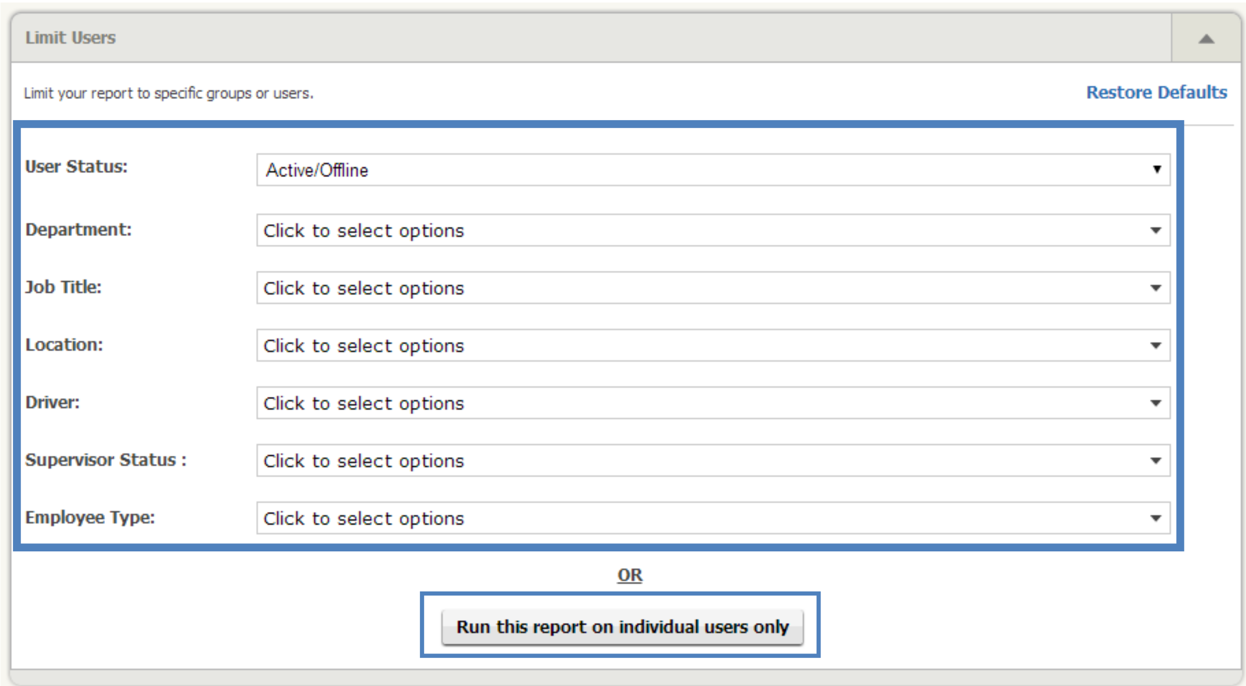
Example: **Display Options** for **Users** report type



Example: **Display Options** for **Incomplete Assignments** report type

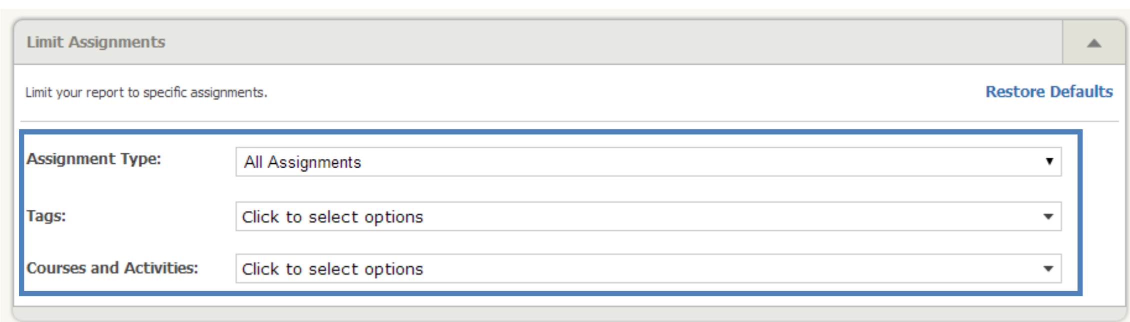


5. Utilize the **Limit Users** field to generate the report based on **User Status, Organization Categories,** and/or **Individual Users**.

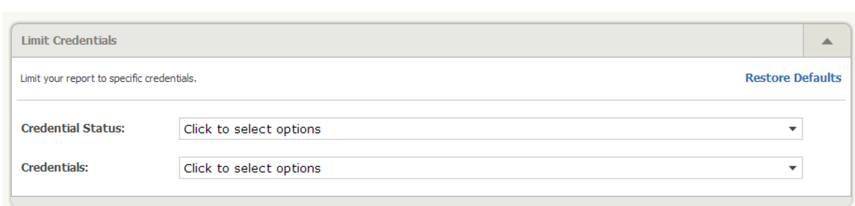


6. Utilize the Limit Assignments field to select by **Assignment Type, Tags,** and/or **Courses and Activities.** *This field may also be listed as Limit Credentials or Limit Components based on report type.*

Completions report



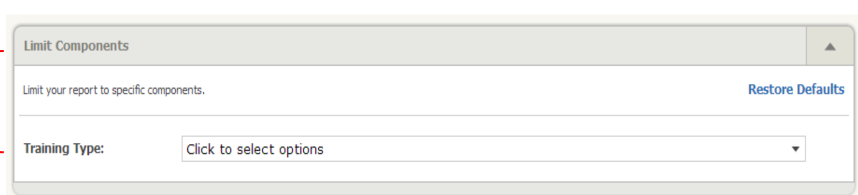
Credentials report



Utilize the **Limit Credentials** field to select by Credential Status and/or Credential.

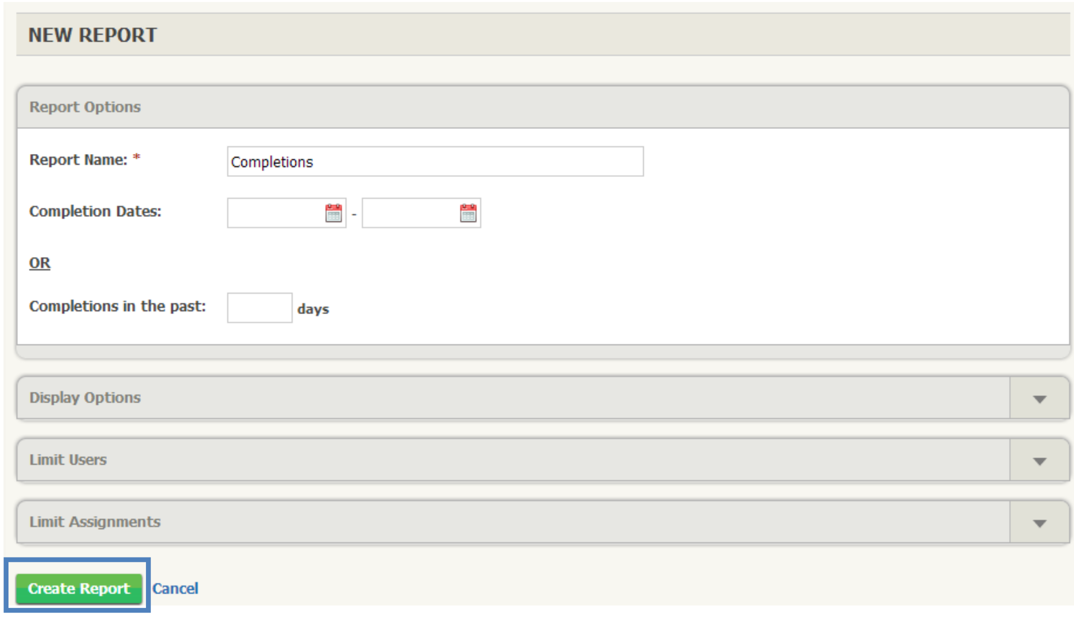
Component Completions report

Aggregate Components report



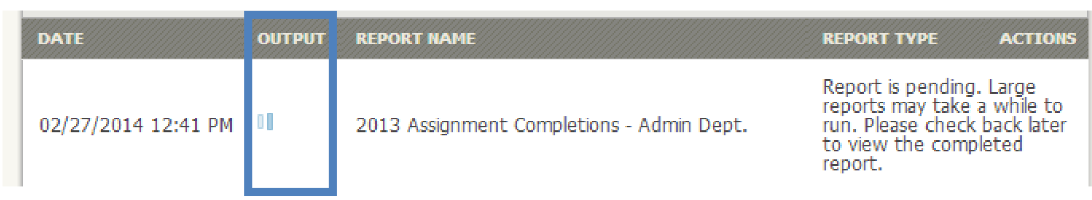
Utilize the **Limit Components** field to select by components listed. Components listed will vary based on Activities built within the site.

7. Once all report information has been entered, click the **Create Report** button.

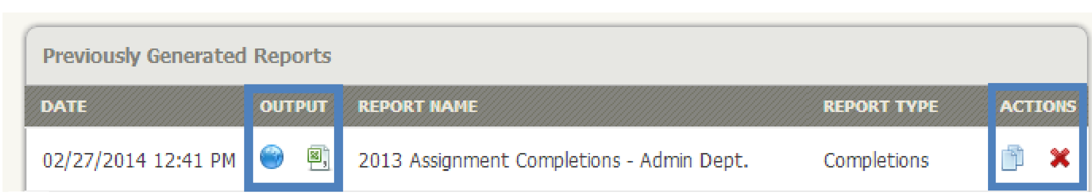


8. The report will begin to generate within the *Generate Reports* application. The report will continue to generate in the background of the site, allowing Platform Managers to work within other applications or exit the program while the report finishes.

   While the report generates, a blue line animation will appear within the **Output** column.



9. When the report finishes, the two icons will appear within the **Output** column allowing Platform Mangers to access the report. Reports generated are unique to the Platform Manager's account.



Use the ***HTML*** report output to open up a new tab within your internet browser. From here, you can view/print certificates or attachments.

Use the ***Excel*** report output to open up an Excel document spreadsheet to save to your computer or share with others.

Use the ***Copy Report*** action to copy the same filter options as the report you are copying. This is a great time saver if you run the same reports on a regular basis.

Use the ***Delete Report*** action when you want to delete a specific report. Remember that once you delete a report, you must generate a new report to retrieve the information.