



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.

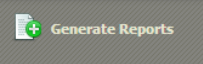
The **Generate New Report** column includes the following: Completions, Incomplete Assignments, Users, No Completions, No Assignments, Aggregate Completions, Credentials, Credentials Exception, Credentials Summary, Component Completions, and Aggregate Components.

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 as 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



- 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.

Display Options ▲

Choose what you would like to see in your report and how you would like the information ordered. Restore Defaults

Display the following information:	User Information	Assignment Information	Training Information
	<input checked="" type="checkbox"/> First Name	<input checked="" type="checkbox"/> Assignment Name	<input checked="" type="checkbox"/> Duration (hours)
	<input checked="" type="checkbox"/> Last Name	<input checked="" type="checkbox"/> Assignment Type	<input type="checkbox"/> Training Type
	<input checked="" type="checkbox"/> Employee ID	<input checked="" type="checkbox"/> Assignment Method	<input type="checkbox"/> Training Category
	<input type="checkbox"/> Email	<input type="checkbox"/> Assigned By	<input type="checkbox"/> Method of Instruction
	<input type="checkbox"/> Department	<input type="checkbox"/> Date Assigned	<input type="checkbox"/> Instructor
	<input type="checkbox"/> Job Title	<input type="checkbox"/> Date Due	<input type="checkbox"/> Agency
	<input type="checkbox"/> Location	<input checked="" type="checkbox"/> Completion Date	<input type="checkbox"/> Location
	<input type="checkbox"/> Driver	<input checked="" type="checkbox"/> Completion Time	<input type="checkbox"/> Units Involved
	<input type="checkbox"/> Supervisor Status	<input type="checkbox"/> Time Spent In Course	<input type="checkbox"/> Additional Information
	<input type="checkbox"/> Employee Type	<input checked="" type="checkbox"/> Test Score	
		<input type="checkbox"/> Test Attempts	
		<input type="checkbox"/> Validated By	
		<input type="checkbox"/> Recorded By	
		<input type="checkbox"/> Date Submitted	
		<input checked="" type="checkbox"/> Certificates	
		<input checked="" type="checkbox"/> Attachments	
		<input type="checkbox"/> Tags	
		<input type="checkbox"/> Course ID	
		<input type="checkbox"/> Transcript ID	

Order the results by:

- Last Name
- First Name
- Completion Date
- Assignment Name
- Test Score

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

Display the following information:

User Information
<input checked="" type="checkbox"/> First Name
<input checked="" type="checkbox"/> Last Name
<input checked="" type="checkbox"/> Employee ID
<input checked="" type="checkbox"/> Email
<input checked="" type="checkbox"/> User Name
<input checked="" type="checkbox"/> User Status
<input checked="" type="checkbox"/> Last Login
<input type="checkbox"/> TS UserID
<input checked="" type="checkbox"/> Department
<input checked="" type="checkbox"/> Job Title
<input checked="" type="checkbox"/> Location
<input checked="" type="checkbox"/> Driver
<input checked="" type="checkbox"/> Supervisor Status
<input checked="" type="checkbox"/> Employee Type
<input type="checkbox"/> Access Over Groups
<input type="checkbox"/> Functionality

Example: Display Options for Incomplete Assignments report type

Display the following information:

User Information	Assignment Information
<input checked="" type="checkbox"/> First Name	<input checked="" type="checkbox"/> Assignment Name
<input checked="" type="checkbox"/> Last Name	<input checked="" type="checkbox"/> Assignment Type
<input checked="" type="checkbox"/> Employee ID	<input checked="" type="checkbox"/> Assignment Method
<input type="checkbox"/> Email	<input type="checkbox"/> Assigned By
<input checked="" type="checkbox"/> Last Login	<input type="checkbox"/> Start Date
<input type="checkbox"/> Department	<input type="checkbox"/> Date Due
<input type="checkbox"/> Job Title	<input checked="" type="checkbox"/> Days Overdue
<input type="checkbox"/> Location	<input type="checkbox"/> Time Spent In Course
<input type="checkbox"/> Driver	<input checked="" type="checkbox"/> Course Status
<input type="checkbox"/> Supervisor Status	<input type="checkbox"/> Tags
<input type="checkbox"/> Employee Type	<input type="checkbox"/> Course ID



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

Limit Users ▲

Limit your report to specific groups or users. [Restore Defaults](#)

User Status:

Department:

Job Title:

Location:

Driver:

Supervisor Status :

Employee Type:

OR

Run this report on individual users only

- 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.*

Limit Assignments ▲

Limit your report to specific assignments. [Restore Defaults](#)

Assignment Type:

Tags:

Courses and Activities:

Completions report

Limit Credentials ▲

Limit your report to specific credentials. [Restore Defaults](#)

Credential Status:

Credentials:

Credentials report

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

Limit Components ▲

Limit your report to specific components. [Restore Defaults](#)

Training Type:

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.

NEW REPORT

Report Options

Report Name: *

Completion Dates: -

OR

Completions in the past: days

Display Options ▼

Limit Users ▼

Limit Assignments ▼

Create Report Cancel

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.

DATE	OUTPUT	REPORT NAME	REPORT TYPE	ACTIONS
02/27/2014 12:41 PM	▬▬	2013 Assignment Completions - Admin Dept.		Report is pending. Large reports may take a while to run. Please check back later to view the completed report.

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

Previously Generated Reports				
DATE	OUTPUT	REPORT NAME	REPORT TYPE	ACTIONS
02/27/2014 12:41 PM		2013 Assignment Completions - Admin Dept.	Completions	

- 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.