



Human Resources
Employee and Organizational
Development

MANAGER'S GUIDE TO ADVANCED REPORTING

UC LEARNING CENTER LEARNING MANAGEMENT SYSTEM

Last updated: 8/31/2020

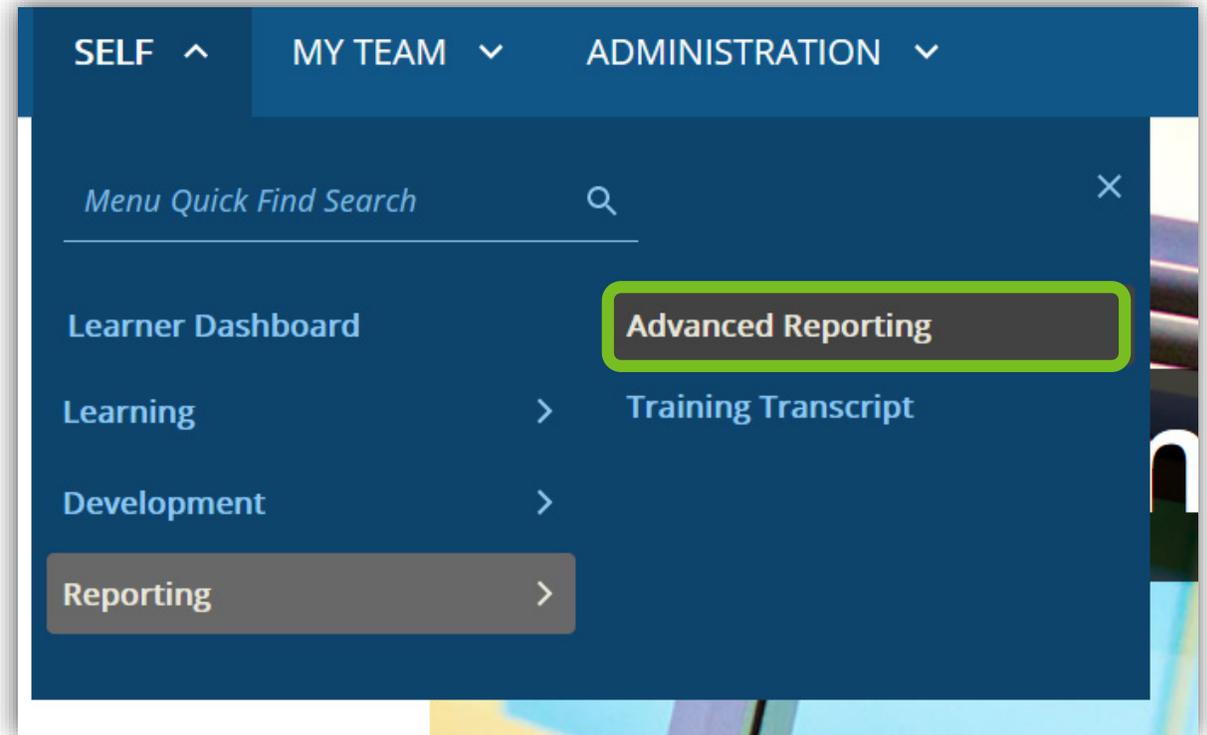
BASIC INSTRUCTIONS

TIP: DATA IN ADVANCED REPORTING IS 1 DAY BEHIND PRODUCTION.

NOTE: The save function has been intentionally disabled. There are additional tools available in the upper toolbar such as a search field and page navigation.

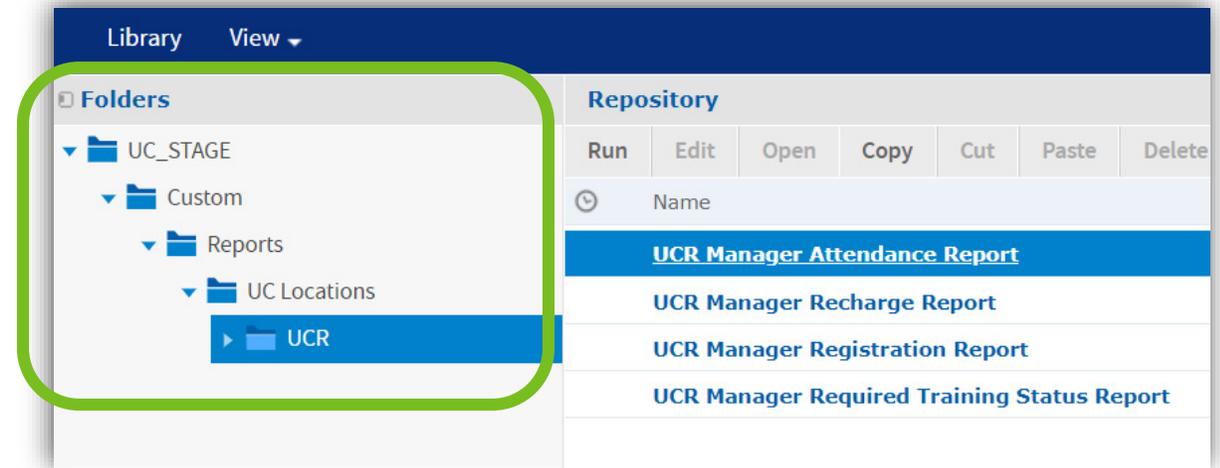
STEP 1

Go to:
**Self > Reporting >
Advanced
Reporting**



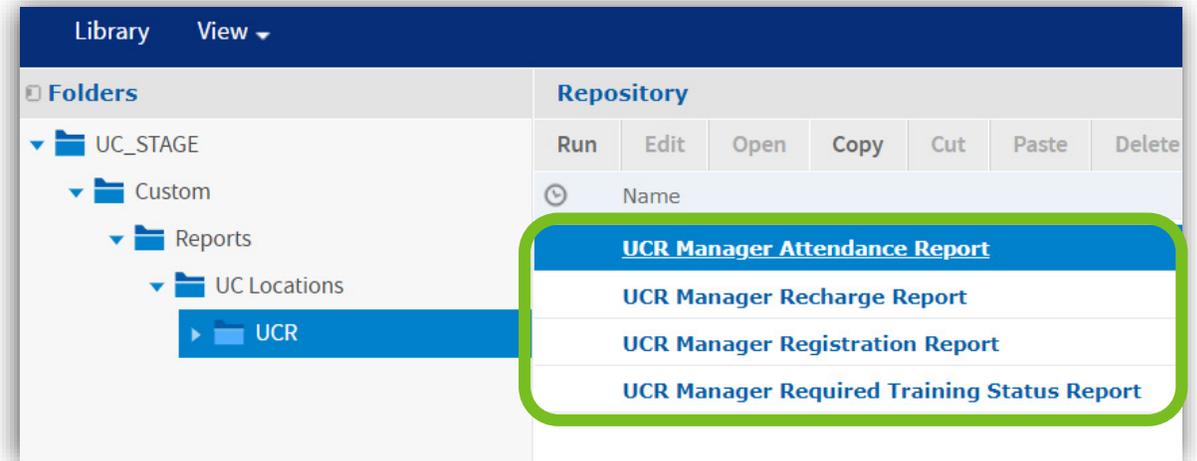
STEP 2

In the folder structure on the left, navigate to: **Custom > Reports > UC Locations > UCR**



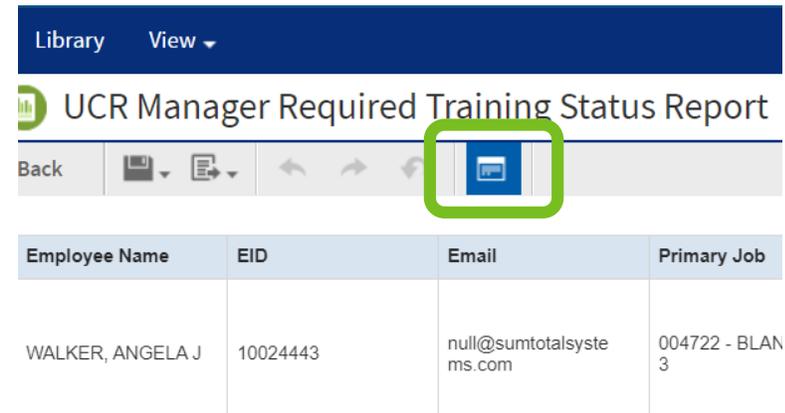
STEP 3

Click on a **report name** to open it



STEP 4A

If needed, click the **Options icon** to adjust report filter settings. When done click OK.



Library View ▾

UCR Manager Required Training Status Report

Back [Print] [Export] [Refresh] [Options] [Cancel]

Employee Name	EID	Email	Primary Job
WALKER, ANGELA J	10024443	null@sumtotalsyste ms.com	004722 - BLAN 3

- **Attendance report filters include:** Attendance Status, Attempt End Date, and Activity Type
- **Recharge report filters include:** Activity Name, Primary Organization (or Department), Registration Status, and Activity Start Date
- **Required Training Report filters include:** Activity Name, Requirement Status, and Primary Organization (or Department)

STEP 4B

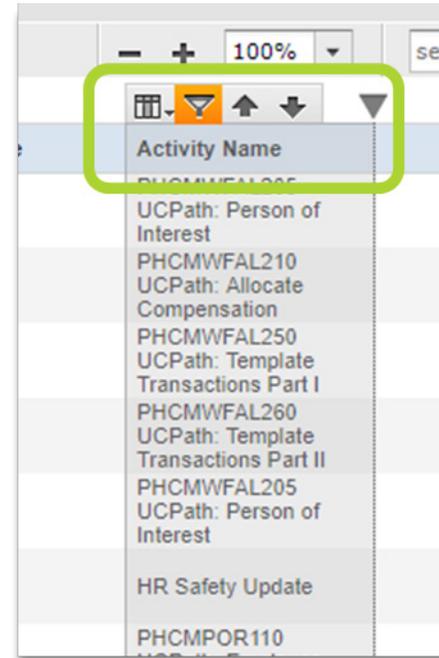
If needed, click the Options icon to **adjust report filter settings**. When done click OK.

The screenshot shows a dialog box titled "Input Controls" with the following elements:

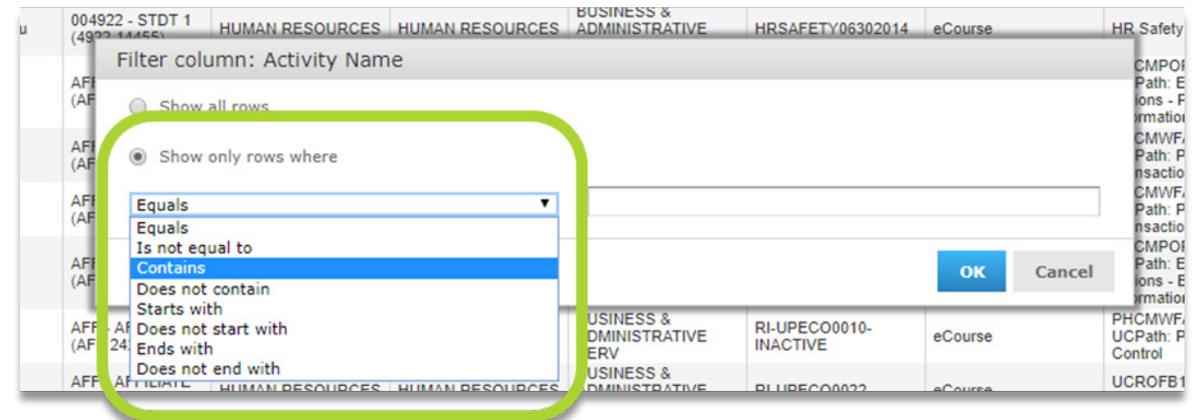
- Attempt End Date between:** A date range filter with a start date of "2019-04-01 00:00:00" and an end date of "2020-03-31 23:59:00".
- Activity Type:** A dropdown menu showing "Available: 16" and "Selected: 6". Below it is a search bar labeled "Search list..." and a list of activity types: Ad Hoc Class, Ad Hoc Course, Class, Conference, Curriculum, Document, eCourse, and ILT Class. The "Class" option is currently selected and highlighted in blue.
- Buttons:** At the bottom, there are five buttons: "Apply" (highlighted in blue), "OK", "Reset", "Cancel", and "Save".

STEP 5

If needed, click on a column heading to filter, format, or sort data

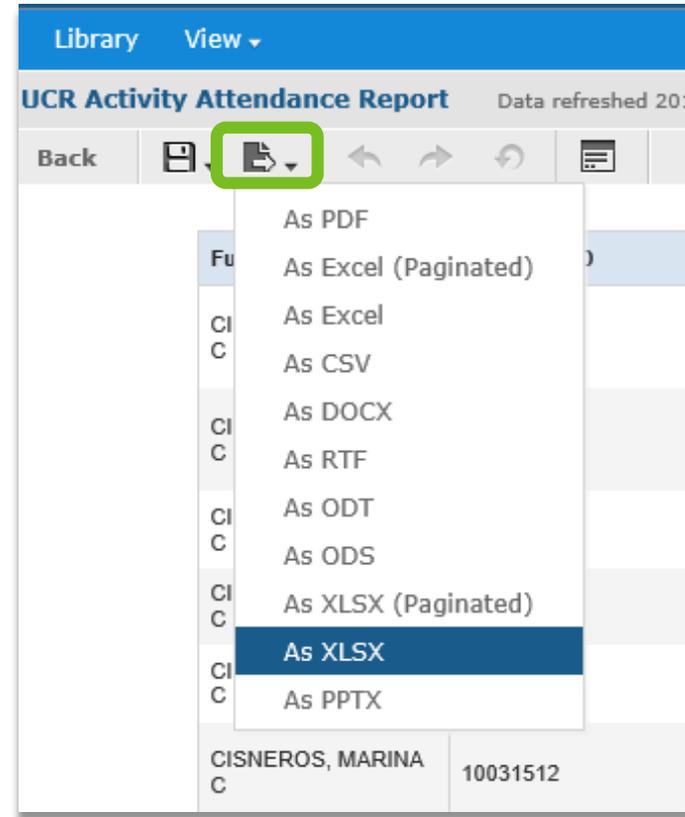


- Click on a column heading to open the column menu. In addition to being able to format and sort records, the column filter provides the ability to further refine the report as needed.



STEP 6

To export the report click the **Export icon** and choose a **file format**. Open or save file as needed.



NOTE: If you export to Excel, and any one column is empty, and you sort the records in Excel with an empty column, the records will not remain matched across the empty column. Excel treats empty columns as separation between tables of data.

REPORT FILTER DESCRIPTIONS

TIP: DATA IN ADVANCED
REPORTING IS 1 DAY BEHIND
PRODUCTION.

ATTENDANCE REPORT FILTERS

WILL STRICTLY FIND REGISTRATIONS WITH AN ATTEMPT END DATE.

- ▶ **Attendance Status:** Use this to filter for Registered, Canceled, In Progress, No Show, or Attended status. *Default:* Includes all except (no data). ((No data) is typically an indicator of a registration to waiting list or expression of interest list or to a curriculum where the subscribed activities have not been completed.)
- ▶ **Attempt End Date:** Use this to select the start and end dates (and times) you would like the report to include.
- ▶ **Activity Type:** We recommend leaving this in the default setting if possible. This can be used to filter by activity type. Please note, changing the default settings could result in duplicate records being pulled in (e.g., using both ILT Course and ILT Class will pull in the records from any course rosters as well as a class roster, additionally, some eCourses are offered through topics and some are not). In some instances, including Topics may be necessary, e.g., reporting on Laboratory Safety Orientation Fundamentals 2013, which is comprised of multiple eCourses. *Default:* Includes Class, Conference, Curriculum, Document, ILT Course, Self-Reported Training, and eCourse.

RECHARGE REPORT FILTERS

WILL STRICTLY FIND ACTIVITIES WITH A COST.

- ▶ **Activity Name Contains:** Enter part of an activity name (e.g., Franklin Covey) to limit the report to a specific activity. *Default:* Blank – which includes all.
- ▶ **User Primary Organization contains:** Use this to limit the report to a subset of departments. *Default:* Blank – which includes all.
- ▶ **Registration Status:** Use this to filter by current status. *Default:* Completed, No-Show, On Waiting List, Registered.
- ▶ **Activity Start Date:** Use this to limit to activities with a start date on or after a specific date and time.
- ▶ **Activity Type:** Can be used to filter by activity type, recommend leaving as is, which includes only activity types with a possible costs. *Default:* ILT Class, Session. Note: Sessions roll-up to an ILT Class and only the first session will typically have a cost.
- ▶ **Activity Cost is greater than or equal to:** Used to filter report to activities with a cost. Recommend leaving as-is. *Default:* 1.

REGISTRATION REPORT FILTERS

WILL STRICTLY FIND ACTIVITIES WITH A START DATE.

- ▶ **Activity Name Contains:** Enter part of an activity name (e.g., Franklin Covey) to limit the report to a specific activity. *Default:* Blank – which includes all.
- ▶ **Registration Status:** Use this to filter for current (Registered/On Waiting List) or Cancelled registrations. *Default:* Registered, On Waiting List.
- ▶ **Activity Start Date:** Use this to limit to activities with a start date on or after a specific date and time. *Default:* After this Day.
- ▶ **Activity Type:** Can be used to filter by activity type, recommend leaving as is. *Default:* Class, ILT Class, Self-Reported Training, and Session. Note: Sessions roll-up to an ILT Class and only the first session will typically have a cost.

TIP: If you try to include online activities such as eCourses or Documents, they will not be show up as they do not have a start date.

REQUIRED TRAINING STATUS REPORT FILTERS

- ▶ **Activity Name Starts with:** Enter the start of an activity name (e.g., UC Sexual Violence) to limit report to a specific activity. *Default:* Blank – which includes all.
- ▶ **Requirement Status:** Use this limit the report to Overdue, Expired, Satisfied, or Assigned statuses. *Default:* None selected – which includes all.
- ▶ **User Primary Organization contains:** Use this to limit the report to a subset of departments. *Default:* None selected – which includes all.

TIP: Filtering Requirement Status to Overdue/Expired/Assigned is similar to pulling an exception report from the Manager Dashboard.