

# TRACORP LMS ADMIN GUIDES

Reports

## Reports User Guide

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## Reports User Guide

### Overview

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There are 22 different reports in the LMS, each one providing different information based on the report selected.

- i. **Main Reports** – These are the most widely used reports in the LMS.
  - a. **Student Activity Report** – All training records for a single student.
  - b. **Student Transcript** – All completed training records for a single student.
  - c. **User Group Records** – Training records for students in a single user group.
  - d. **Content Records** – Training records for students for a single piece of content.
  - e. **Learning Track** – Training records for students for a single learning track.
- ii. **Other Reports** – Will be added at a later date.
- iii. **Saved Reports** – Show reports that you have saved or that others have shared with you.
  - a. **Saving Reports**
  - b. **Sharing Reports**

**Note:** Student records will not update until overnight; therefore, anything that a student does today will not show on a report until tomorrow.

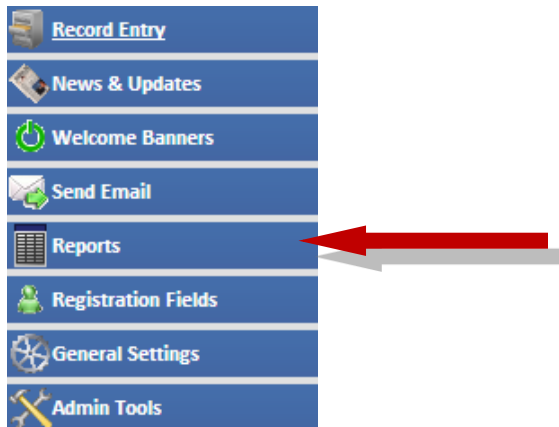
**Note:** The most recent version of this user guide can be found at <http://helpdesk.tracorp.com>.

## Main Reports

### Student Activity Report

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1. On the **Admin Navigation** bar click **Reports**.



2. Click **Student Activity Report**.



**Note:** None of the following options are required to make the report. Options just help you filter the information to see only what you want on the report.

3. On the **Format** dropdown, select one of the following options:
  - a. **Online** – Will show a pop up of the records.
  - b. **Spreadsheets (CSV)** – Will download a spreadsheet of records that can be opened in Excel.
  - c. **PDF** – Will download a PDF of the records. This cannot be manipulated.

4. On the **Content Activity** dropdown, select one of the following options:
  - a. **Launched** – Will provide only records with a launch number.
  - b. **Not Launched** – Will provide only records without a launch number.
  - c. **Both** – Will provide records from both activity types.

**Report Options - Student Activity**

Format:

Content Activity:

5. Pick **Date Range** options.
  - a. **Date Type** – This option gives you a predetermined list of date ranges based on the current date.
  - b. **Date Range** – Allows you to select the date range for records.
  - c. **Date Range applies to** – Sets the type of dates the date range examines. If you don't select a date type, the filter looks at all dates on a record (i.e. completion, start, etc.).

**Date Range**

Date Type:

Date Range: From:  To:

Date Range applies to:

6. Pick the **Completion** type that you would like.
  - a. **All Results** – Gives results with both completions and incomplete content records.
  - b. **Completed Only** – Gives results for only completed content records.
  - c. **Not Completed Only** – Gives results for only incomplete content records.
7. **Include date the content was assigned** – Adds a column to show the date the content was first assigned.
8. **If set, include the due by date** – If the content has a due date, it will show the indicated date. If the content was required, it will show if the content was completed by the due date.
9. **Only records w/ due dates (downloads only)** – Will show only records that have a due date. Only works with **CSV** or **PDF Format**.

10. **Show login count** – Show how many times a user has signed in.
  - a. The option **Track user logins (for reports)** must be turned on under General Setting > Login before this will show a count.

Completion:

Include date the content was assigned:

If set, include the due by date:

Only records w/ due dates (downloads only):

Show login count:

11. Find the user that you would like to run the report on.
12. Once the user is found, click **Create Report**.
  - a. The report will either show a pop up or download based on the **Format** selected.

**Select A User**

Filter users where Username  starts with   Show Inactive User Type:

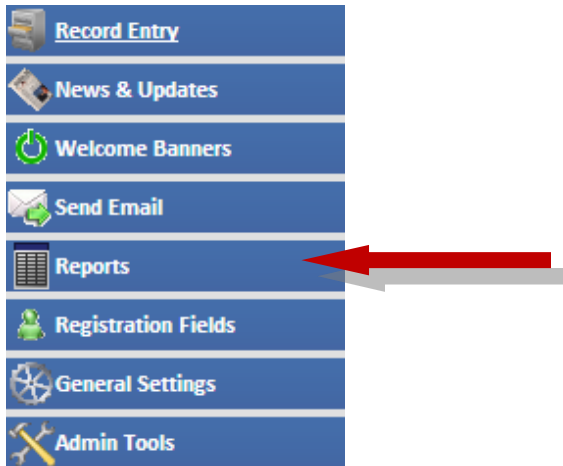
Active	Username	First	Last	Email
No users matched the search criteria, or users have not been loaded yet. Press the Go button above to load users.				

**Note:** **Save Settings** is now in another part of this guide. Click [here](#) to jump to that page.

## Student Transcript

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1. On the **Admin Navigation** bar click **Reports**.



2. Click **Student Activity Report**.



3. **Sort By** – Will sort by the date type chosen from the drop down.
4. Find the user that you would like to run the report on.
5. Once the user is found, click **Create Report**.
  - a. The report will either show a pop or download based on the **Format** selected.

Sort By:

**Select A User**

Filter users where  starts with  Go Show Inactive User Type:

Active	Username	First	Last	Email
No users matched the search criteria, or users have not been loaded yet. Press the Go button above to load users.				

6. There are multiple settings that can be changed in **General Settings**. The options can be found at **General Settings > General Administration > Transcript Options**.

**Transcript Options**

Transcript Orientation:  Portrait  Landscape

Transcript Layout:  Detailed  Minimalist  Custom

Order Transcript By:   Ascending  Descending

Show CEUs on Student Transcript:

- a. **Transcript Orientation** – This option allows you to select the orientation of the transcript.
- b. **Transcript Layout**
  - i. **Detailed** – Shows all information regarding individual records
  - ii. **Minimalist** – Shows Content Title, Completion Date, Score, and Credits for each record.
  - iii. **Custom** – This option needs to be turned on by TraCorp. If you are interested in a custom Transcript, please contact TraCorp for more information.
- c. **Order Transcript By** – This dropdown sets the default behavior for the transcript (can be changed while running the report).
- d. **Show CEUs on Student Transcript** – Allows you to add CEUs to the transcript.

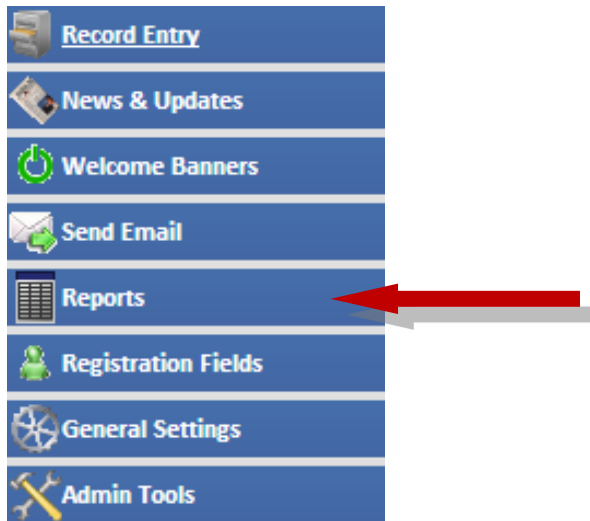


## User Group Records

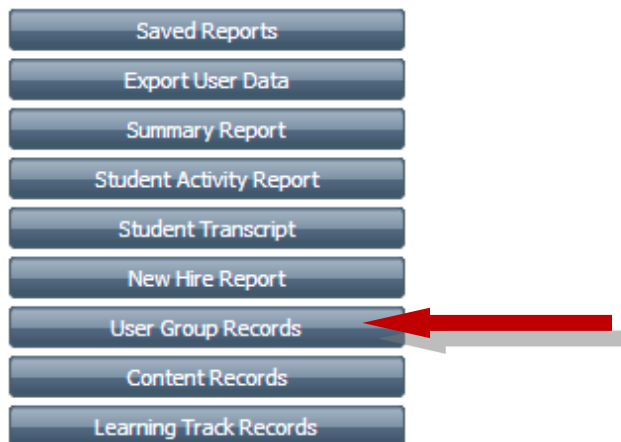
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**Note:** None of the following options are required to make the report. Options just help you filter the information to see only what you want on the report.

1. On the **Admin Navigation** bar click **Reports**.



2. Click **Student Activity Report**.



3. On the **Format** dropdown, select one of the following options:
  - a. **Online** – Will show a pop up of the records.
  - b. **Spreadsheets (CSV)** – Will download a spreadsheet of records that can be opened in Excel.
  - c. **PDF** – Will download a PDF of the records. This cannot be manipulated.

4. On the **Content Activity** dropdown, select one of the following options:
  - a. **Launched** – Will provide only records with a launch number.
  - b. **Not Launched** – Will provide only records without a launch number.
  - c. **Both** – Will provide records from both activity types.

The screenshot shows a window titled "Report Options - User Group Report". It contains two dropdown menus. The first is labeled "Format:" and is set to "Online". The second is labeled "Content Activity:" and is set to "Launched".

5. Pick **Date Range** options. The filter looks at all dates on a record (i.e. completion, start, etc.).
  - a. **Date Type** – This option gives you a predetermined list of date ranges based on the current date.
  - b. **Date Range** – Allows you to select the date range for records.

The screenshot shows a "Date Range" section. It includes a "Date Type:" dropdown menu currently set to "Select a value". Below it, there are two "Date Range:" fields. The "From:" field is set to "(Any)" and the "To:" field is also set to "(Any)".

6. **Active Users Only** – Will only show users that are active in the LMS.
7. **Include Child Usergroups** – If a user group has more user groups nested within, then it will show the nested groups
8. **Include Bundled Children** – Will show individual content assigned to **Bundled Content**.
9. **Only records w/ due dates (downloads only)** – Will show only records that have a due date. Only works with **CSV** or **PDF Format**.
10. **Remove unassigned content** – Will remove all of the content that is not assigned to users

The screenshot shows a section titled "Other Options:" with five checkboxes. The first three are "Active Users Only", "Include Child Usergroups", and "Include Bundled Children", all of which are unchecked. The last two are "Only records w/ due dates (downloads only)" (unchecked) and "Remove unassigned content" (checked).

11. **Fields (note: PDF reports always have certain fields)** – This box gives you the options to add additional columns to the report. You can use Ctrl + Left Click to highlight or remove the highlight from different options.
12. Pick the **Completion** type that you would like.
  - a. **All Results** – Gives results with both completions and incomplete content records.
  - b. **Completed Only** – Gives results for only completed content records.
  - c. **Not Completed Only** – Gives results for only incomplete content records.

### 13. Content With Multiple Records

- a. **If any record is complete, show all as complete** – If there are multiple records for a piece of content and any of those records are complete, this option will show all records with completions.
- b. **Show all records individually** – If there are multiple records for a piece of content, this option will show them as complete or incomplete.

### 14. Group Record

- a. **Show all records individually** – Will show all records for a piece of content
- b. **Use only the most recent record** – Will show only the most recent record if there are multiple records.

15. **Sort By** – Choose how you would like the report sorted before downloading.

16. **Filter By/Terms** - This will allow you to only show specific users based off the User Group selected.

- a. **Filter By** – Choose the field for your filter from the drop down.
- b. **Filter Terms** – Choose the option to filter. This will populate with all possible options after choosing the field.

The screenshot shows a configuration panel for a report. On the left, a note states: "Fields (note: PDF reports always have certain fields):". The main area contains several settings:

- Fields:** A list box containing "User", "Email", "Content Code", "Content Title", "Content Category", and "Content Type".
- Completion:** A dropdown menu set to "All Results".
- Content With Multiple Records:** A dropdown menu set to "If any record is complete, show all as complete".
- Group Records:** A dropdown menu set to "Show all records individually".
- Sort By:** A dropdown menu set to "Last Name".
- Filter By:** A dropdown menu set to "No filter".
- Filter Terms:** A text input field containing "No filter".

17. Find the User Group that you would like to run the report on and click on the report to highlight.

18. Once the User Group is found, click **Create Report**.

- a. The report will either show a pop or download based on the **Format** selected.

The screenshot shows a "User Group" selection interface. It features a list of user groups, each with a small icon and a count in parentheses:

- ! Hotel 1234 (0)
- 10747.1 Six Sigma (5)
- 2013 Conference (0)
- 508 Compliance Testing (0)
- Customer (18)
- DPelland (0)
- EC Group (0)
- Everyone (1)
- ESP Clusters (0)

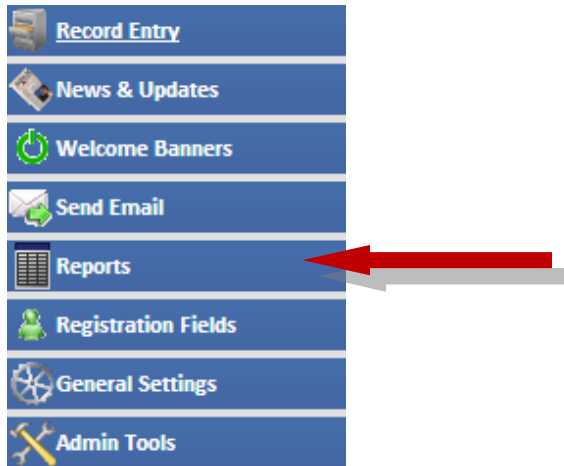
At the bottom of the list, there are two buttons: "Create Report" and "Save Settings".

**Note:** **Save Settings** is in another part of this guide. Click [here](#) to jump to that page.

## Content Records

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1. On the **Admin Navigation** bar click **Reports**.



2. Click **Student Activity Report**.



**Note:** None of the following options are required to make the report. Options just help you filter the information to see only what you want on the report.

3. On the **Format** dropdown, select one of the following options:
  - a. **Online** – Will show a pop up of the records.
  - b. **Spreadsheets (CSV)** – Will download a spreadsheet of records that can be opened in Excel.
  - c. **PDF** – Will download a PDF of the records. This cannot be manipulated.

4. On the **Content Activity** dropdown, select one of the following options:
  - a. **Launched** – Will provide only records with a launch number.
  - b. **Not Launched** – Will provide only records without a launch number.
  - c. **Both** – Will provide records from both activity types.

**Report Options - Content Report**

Format:

Content Activity:

5. Pick **Date Range** options.
  - a. **Date Type** – This option gives you a predetermined list of date ranges based on the current date.
  - b. **Date Range** – Allows you to select the date range for records.
  - c. **Date Range applies to** – Sets the type of dates the date range examines. If you don't select a date type, the filter looks at all dates on a record (i.e. completion, start, etc.).

**Date Range**

Date Type:

Date Range: From:  To:

6. **Include date the content was assigned** – Adds a column to show the date the content was first assigned.
7. **Only records w/ due dates (downloads only)** – Will show only records that have a due date. Only works with **CSV** or **PDF Format**.
8. **Include Email Address** – Will add a column to show the users email address.
9. **Include Bundled Children** – Will show individual content assigned to **Bundled Content**.
10. **If set, include the due by date** – If the content has a due date, it will show the indicated date. If the content was required, it will show if the content was completed by the due date.
11. **Active Users Only** – Will only show users that are active in the LMS.
12. **Remove unassigned content** – Will remove all of the content that is not assigned to uses.
13. **Show login count** – Show how many times a user has signed in.
  - a. The option **Track user logins (for reports)** must be turned on under General Setting > Login before this will show a count.

**Other Options:**

<input type="checkbox"/> Include date the content was assigned	<input type="checkbox"/> If set, include the due by date
<input type="checkbox"/> Only records w/ due dates (downloads only)	<input type="checkbox"/> Active Users Only
<input type="checkbox"/> Include Email Address	<input checked="" type="checkbox"/> Remove unassigned content
<input type="checkbox"/> Include Bundled Children	<input type="checkbox"/> Show login count

14. Pick the **Completion** type that you would like.
  - d. **All Results** – Gives results with both completions and incomplete content records.
  - e. **Completed Only** – Gives results for only completed content records.
  - f. **Not Completed Only** – Gives results for only incomplete content records.
15. **Content With Multiple Records**
  - c. **If any record is complete, show all as complete** – If there are multiple records for a piece of content and any of those records are complete, this option will show all records with completions.
  - d. **Show all records individually** – If there are multiple records for a piece of content, this option will show the records as complete or incomplete.
16. **Group Record**
  - a. **Show all records individually** – Will show all records for a piece of content.
  - b. **Use only the most-recent record** – Will show only the most recent record if there are multiple records.
17. **Extra Field** – User Ctrl + Left Click to add more columns to the report.
18. **Sort By** – Choose how you would like the report to be sorted before downloading.
19. **Filter By/Terms** - This will allow you to only show certain users based off the User Group selected.
  - c. **Filter By** – Choose the field for your filter from the drop down.
  - d. **Filter Terms** – Choose the option to filter. This will populate with all possible options after choosing the field.

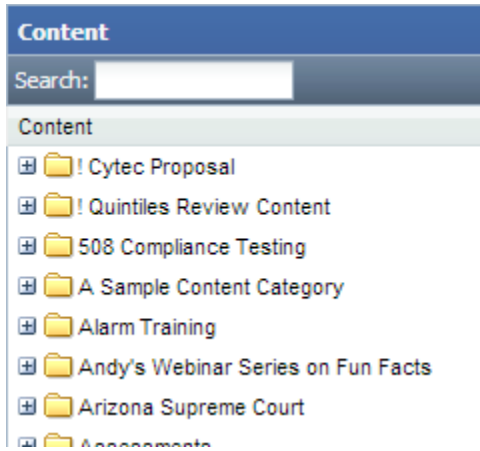
The screenshot shows a configuration panel for a report with the following settings:

- Completion:** All Results
- Content With Multiple Records:** If any record is complete, show all as complete
- Group Records:** Show all records individually
- Extra Fields:** Job Title, Phone Number, Business Unit, Geographic Location
- Sort By:** Last Name
- Filter By:** No filter
- Filter Terms:** No filter

20. Find the content that you would like to run the report on.
  - a. You can also use the search box to find content easily (Only searches the content title and content code).

21. Once the content is found, click **Create Report**.

a. The report will either show a pop or download based on the **Format** selected.

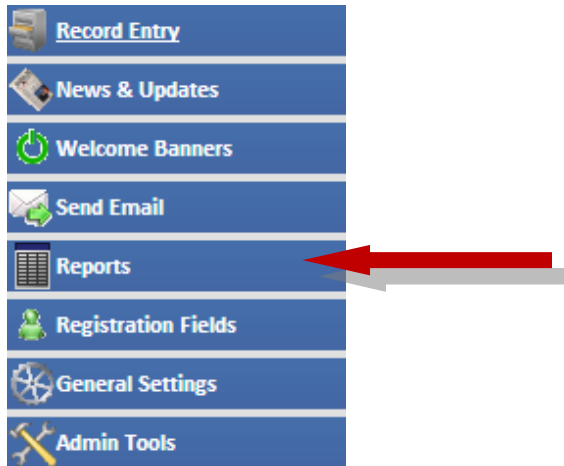


**Note:** **Save Settings** is gone over in another part of this guide. Click [here](#) to jump to that page.

## Learning Track Records

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1. On the **Admin Navigation** bar click **Reports**.



2. Click **Learning Track Records**.



**Note:** None of the following options is required to make the report. They just help you filter the report so you can only see what you want on the report.

3. On the **Format** dropdown, select one of the following options:
  - a. **Online** – Will show a pop up of the records.
  - b. **Spreadsheets (CSV)** – Will download a spreadsheet of records that can be opened in Excel.
  - c. **PDF** – Will download a PDF of the records. This cannot be manipulated.



4. On the **Content Activity** dropdown, select one of the following options:
  - a. **Launched** – Will provide only records with a launch number.
  - b. **Not Launched** – Will provide only records without a launch number.
  - c. **Both** – Will provide records from both activity types.

**Report Options - Learning Track Report**

Format:

Content Activity:

5. Pick **Date Range** options.
  - a. **Date Type** – this option gives you a predetermined list of date ranges based on the current date.
  - b. **Date Range** – Allows you to select the date range for records.
  - c. **Date Range applies to** – Sets the type of dates the date range looks at. If you don't select a date type, the filter looks at all dates on a record (i.e. completion, start, etc.)

**Date Range**

Date Type:

Date Range: From:  To:

6. **Include date the content was assigned** – Adds a column to show the date the content was first assigned.
7. **Only records w/ due dates (downloads only)** – Will show only records that have a due date. Only works with CSV or PDF **Format**.
8. **Include Email Address** – Will add a column to show the users email address.
9. **Only include assigned users** – Will show only user that are currently assigned to the Learning Track
10. **Include Bundled Children** – Will show individual content assigned to **Bundled Content**.
11. **If set, include the due by date** – If the content has a due date, it will show the indicated date. If the content was required, it will show if the content was completed by the due date.
12. **Active Users Only** – Will only show users that are active in the LMS.
13. **Remove unassigned content** – Will remove all of the content that is not assigned to uses.
14. **Include Child Learning Tracks** – If any Learning Tracks are nested with in your chosen track, those nested tracks will be shown.

15. **Show login count** – Show how many times a user has signed in.
- The option **Track user logins (for reports)** must be turned on under General Setting > Login before this will show a count.

Other Options:

<input type="checkbox"/> Include date the content was assigned	<input type="checkbox"/> If set, include the due by date
<input type="checkbox"/> Only records w/ due dates (downloads only)	<input type="checkbox"/> Active Users Only
<input type="checkbox"/> Include Email Address	<input checked="" type="checkbox"/> Remove unassigned content
<input type="checkbox"/> Only include assigned users	<input checked="" type="checkbox"/> Include Child Learning Tracks
<input type="checkbox"/> Include Bundled Children	<input type="checkbox"/> Show login count

16. Pick the **Completion** type that you would like.
- All Results** – Gives results with both completions and incomplete content records.
  - Completed Only** – Gives results for only completed content records.
  - Not Completed Only** – Gives results for only incomplete content records.
17. **Content With Multiple Records**
- If any record is complete, show all as complete** – If there are multiple records for a piece of content and any of those records are complete, this option will show all records with completions.
  - Show all records individually** – If there are multiple records for a piece of content, this option will show the records as complete or incomplete.
18. **Group Record**
- Show all records individually** – Will show all records for a piece of content
  - Use only the most recent record** – Will show only the most recent record if there are multiple records.
19. **Extra Field** – User Ctrl + Left Click to add more columns to the report.
20. **Sort By** – Choose how you would like the report to be sorted before downloading.
21. **Filter By/Terms** - This will allow you to only show specific users based off the User Group selected.
- Filter By** – Choose the field for your filter from the drop down.
  - Filter Terms** – Choose the option to filter. This will populate with all possible options after choosing the field.

Completion: All Results

Content With Multiple Records: If any record is complete, show all as complete

Group Records: Show all records individually

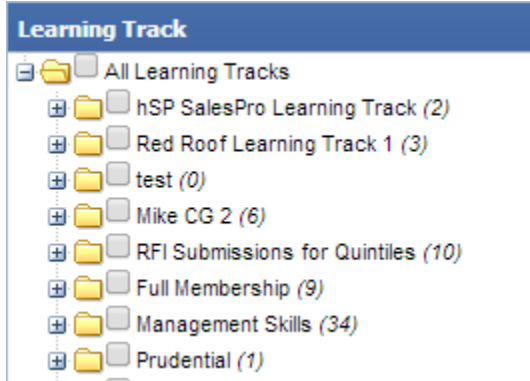
Extra Fields: Job Title, Phone Number, Business Unit, Geographic Location

Sort By: Last Name

Filter By: No filter

Filter Terms: No filter

22. Find the Learning Track that you would like to run the report on.
  - a. You can select multiple tracks just by selecting the reports individually.
23. Once the learning track is found, click **Create Report**.
  - a. The report will either show a pop up or download based on the **Format** selected.



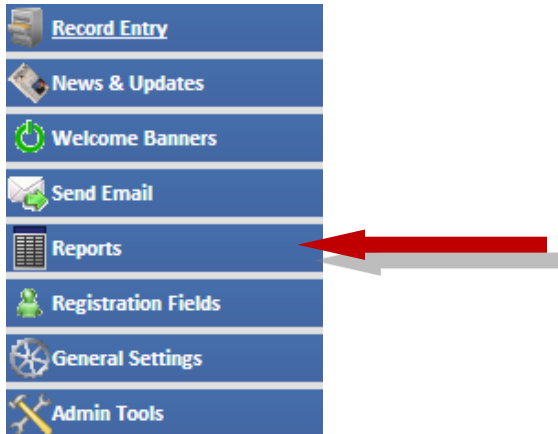
**Note:** **Save Settings** is in another part of this guide. Click [here](#) to jump to that page.

## Saved Reports

### Saving Reports

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1. On the **Admin Navigation** bar click **Reports**.



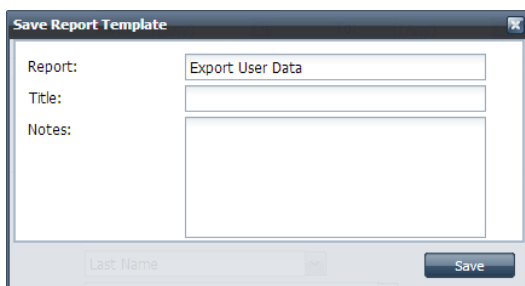
2. Select the report that you would like to save.



3. After making the setting in the report what you like, you can save the report by clicking **Save Settings** at the bottom of the report, next to **Create Report**.



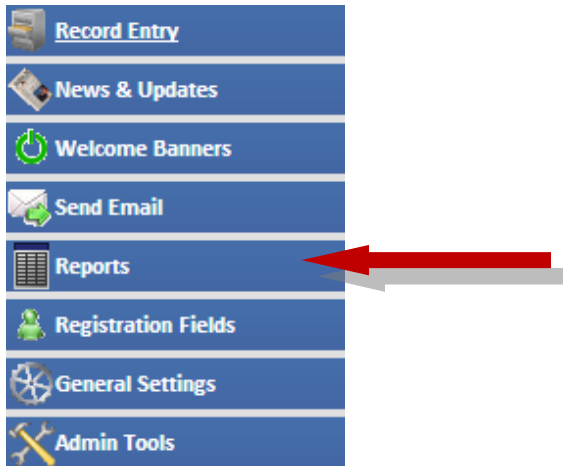
4. Fill out the **Title**, any **Notes** that you want, and click **Save**.

A dialog box titled 'Save Report Template'. It contains three input fields: 'Report:' with 'Export User Data' selected, 'Title:', and 'Notes:'. At the bottom, there is a 'Last Name' field and a 'Save' button.

## Sharing Reports

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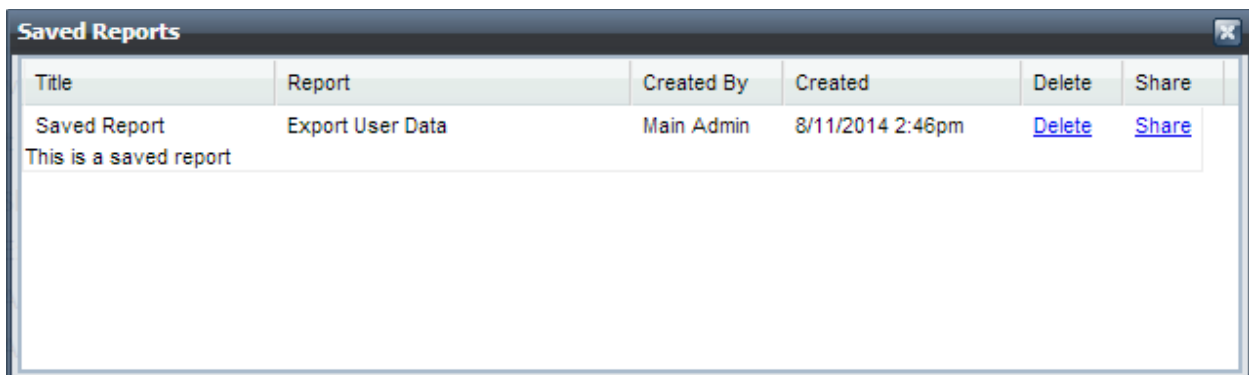
1. On the **Admin Navigation** bar click **Reports**.



2. Select the **Save Reports**.



3. Select a report from your list.
  - a. Double click to open and run the report.
  - b. Click share to open the sharing options.



The screenshot shows a window titled 'Saved Reports'. It contains a table with the following data:

Title	Report	Created By	Created	Delete	Share
Saved Report This is a saved report	Export User Data	Main Admin	8/11/2014 2:46pm	<a href="#">Delete</a>	<a href="#">Share</a>

4. Under **Share** there are three ways to share with other users.
  - a. **Select Users** – Will show a searchable list similar to the one found under **Admin Navigation > Users**. Multiple users can be selected at one time by using Ctrl/Shift + Left Click.
  - b. Once you have shared a different report with others, the dropdown will populate with those report title. This option will share the report with the same users that have had that select report shared.
  - c. The third option is using SQL. This is the same as what is used for autoassignments. The information for SQL can be found under any Usergroup’s Autoassignment tab or the Autoassignment section of the User Group Guide.
5. Finally, click **Share** and an email will be sent to the admins that have gotten the report and will show under **Saved Reports**.

