Assessment Reporting

Purpose: This job aid details how Administrators with the Report Manager role and Course Providers can create assessment results reports.

Access:
- Administrators with the Report Manager role are able to run reports for courses assigned to a group below their role in the organization's grouping structure.
- Course Providers are able to run reports for courses they have rights to edit.

Related Functionality:
- All functionalities related to creating assessments results reports.

Create a New Assessment Results Report:

1. Log in at https://www.train.org/.
2. Go to Admin.
3. Click on Reports.
4. Click on Reports (View and run saved reports).
5. Click on Assessment Results (Assessment Results for selected courses).
6. Click on Add a new report. TRAIN will open the Edit report page.
7. Create a Report Title or leave the report titled "Assessment Results."
8. Choose a Date Range for the assessment result report—the date range will filter report output by the "Completion Date" of assessment records.
   a. Fixed date (start date and end date).
   b. Last week.
   c. Last month.
9. Click on the Report Schedule dropdown to set automatic weekly or monthly assessment result report delivery. Select none if the report schedule is not needed.
10. Select Summary View or Participants View for desired report mode.
11. Click on search course by course ID or course name on the right-hand side under the course section to search for courses.
12. Select course by clicking on the green add (+) icon on the left-hand side. Selected courses can be removed by clicking on the red remove (x) icon in front of the selected course name. Course selection is required. The search bar shows courses available to the course provider or admin via the Report Manager role.
13. Search for an assessment by ID number or Assessment name under the assessment section of the page. Assessments available for the course will be presented by default after selecting the course.
14. Click on the green add (+) icon to select assessment from the search results. Selected assessments can be removed by clicking on the red remove (x) icon

[YouTrack Ticket # TRAIN3-340, TRAIN3 Assessments and Evaluations]

in front of the assessment name. Assessment selection is required. Only one assessment can be selected for the report.

15. Click on Advanced Options to expand the group selection options for assessment results.

16. Search by group name to add groups. A group selector will be shown by default with the logged-in admin's groups.
This establishes which subset of groups the report will be run for.

17. Click on the tree view option to expand and view the group's full structure.

18. Select group by clicking on the green add (+) icon in front of the group name. Groups can be removed from selection by clicking on the red remove (x) icon in front of the group name after the selection.

19. Select Reporting Setting choice from the list, if applicable.
    a. Include administrators (checked by default).
    b. Include inactive (closed) user accounts (unchecked by default).

20. Click on Save to generate the assessment result report. Saving all the entered report selections will create an assessment result report.
The report runs in the background. You can leave the web page and navigate back to download the report once it is complete.

21. Click on the Download icon to download the report.

22. Click on Refresh to generate the report anew. The downloaded assessment result report will be presented in excel format.

Creating Assessment Results Report via the Course Edit Page:

1. Go to Admin.
2. Go to Content.
3. Click on Find and Edit existing content.
4. Search for course by ID number or course name.
5. Click on the Edit icon to the left of the course title.
6. Click on Roster.
7. For live events, click on sessions.
8. Click on Tools.
9. Click on Assessment Results from the Tools dropdown. Clicking on the assessment result report will direct to the edit report page.
10. Click on the report schedule dropdown to set automatic weekly or monthly assessment result report delivery. Select none if the report schedule is not needed.
11. Choose a Date Range for the assessment result report—the date range will filter report output by the completion date of assessment records.
    a. Fixed date (Start date and end date).
    b. Last week.
    c. Last month.
12. Select Summary View or Participants View for desired Report Mode.
13. Search for an assessment by ID number or assessment name under the assessment section of the page. Assessments already available for the course

will be presented by default after selecting the course. If there are no existing pre- or post-assessments available for the course, then the assessment section will show "there are no records found".

14. Click on the green add (+) icon to select assessment. Selected assessments can be removed by clicking on the red remove (x) icon in front of the assessment name. Assessment selection is required. Only one assessment can be selected for the report.
15. Click on Advanced options to expand the group selection options for assessment results.
16. Search by learner group name or group id to add learner groups. There will be learner groups listed underneath the search bar by default logged-in admin's group structure.
17. Click on Tree view options to expand and view the group's full structure.
18. Select a group by clicking on the green add (+) icon in front of group names. Groups can be removed from selection by clicking on the red remove (x) icon in front of the group name after the selection.
19. Select Reporting setting choice, if applicable.
    a. Include administrators (checked by default).
    b. Include inactive (closed) user accounts (unchecked by default).
20. Click on Generate Report to create the assessment results report. Saving the selections will generate an assessment results report. If the pop-up window is closed, the generated report will be discarded. New assessment results click will generate a new instance of the report.
21. Click on Refresh to refresh the report status and download again. Assessment Name and Assessment Type info will be presented in the report. The downloaded file will be in excel format.

Edit Assessment Results Report:

1. Go to Admin.
2. Click on Reports.
3. Click on Reports (View and run saved reports).
4. Click on Assessment Results (Assessment Results for selected courses).
5. Click on the pencil icon in front of the report title. It will open the edit report page where all the selected report parameters can be modified.
6. Click on Save after making an edit to the existing report selection.
7. Click on Save to generate the report.
8. Click on the Download icon to download the report.
9. Click on Refresh to generate the report anew.
10. Click on the Download icon to download the report again.