

Training Plan Reporting

Purpose: Learn how to use three types of Training Plan Reports, listed below

- **Training Plan Progress Details Report**
Provides learner details like registration status in selected training plans
- **Training Plan Progress Summary Graphs Report**
Provides a visual illustration of learner progress in selected training plans
- **Training Plan Summary Report**
Provides a general overview of a training plan's courses, learners, and completion statistics

Administrative Roles with Access:

- **Training Plan Progress Details Report**
 - Report Manager
 - Training Plan Manager
- **Training Plan Progress Summary Graphs Report**
 - Training Plan Manager
- **Training Plan Summary Report**
 - Report Manager
 - Training Plan Manager

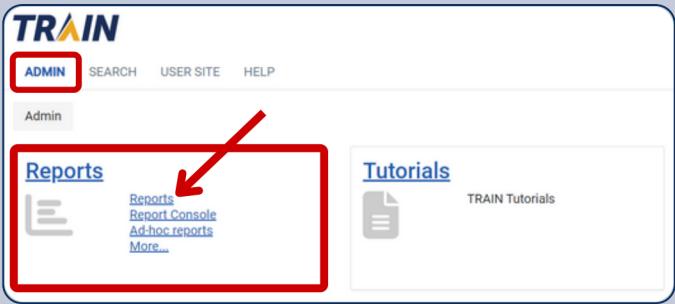
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Navigate to Reports

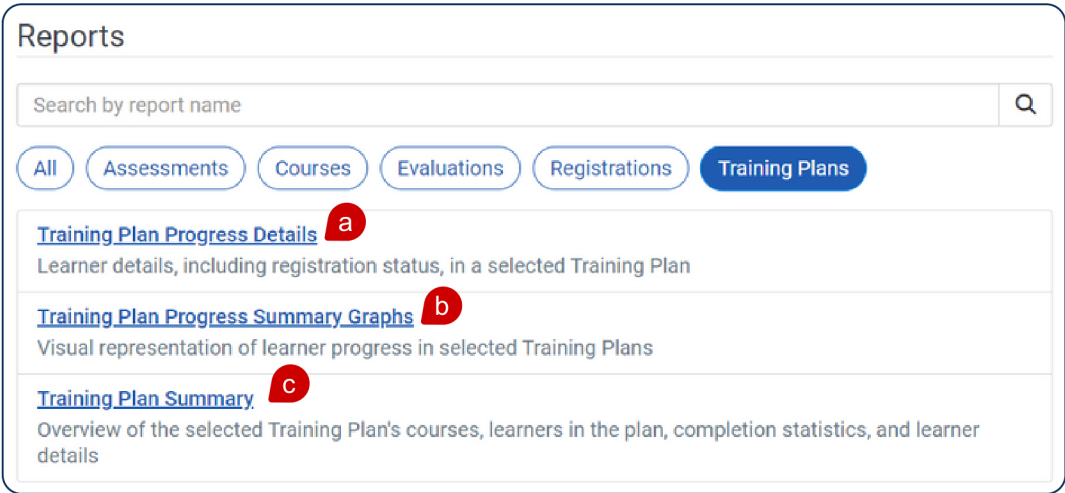
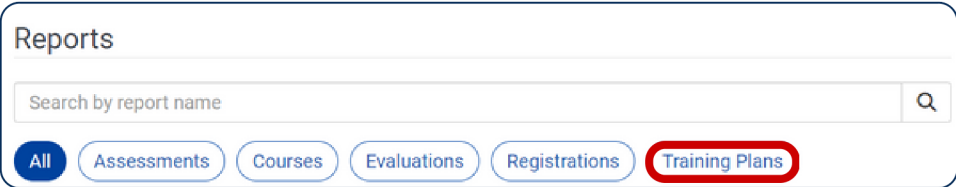
Go to the **Admin** menu. Then, Click on the first [Reports](#) link in the Reports tile.



Add a New Training Plan Report

2

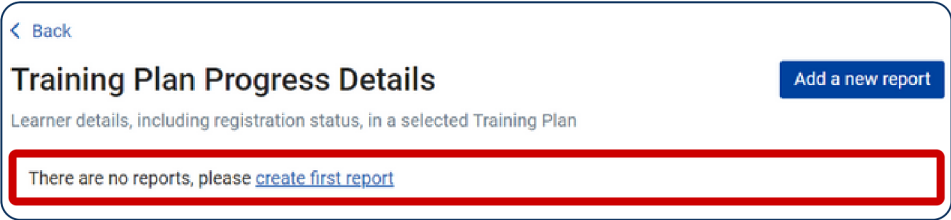
Click on the **Training Plans** category to view the types of Training Plan Reports available.



To create a report, click on your desired report type:

- (a) Training Plan Progress Details
- (b) Training Plan Progress Summary Graphs
- (c) Training Plan Summary

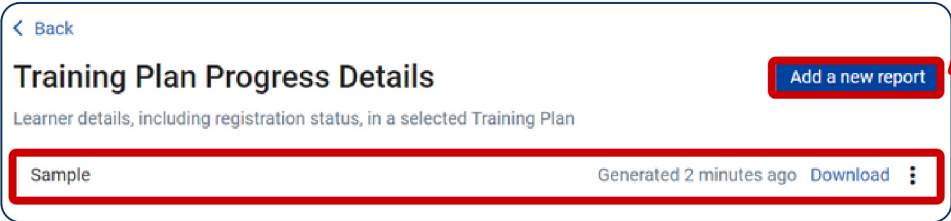
>> If you have not yet created a report, you will see this page:



>> To create a new report, click the blue **Add a new report** button:



>> If you have previously created reports, they will appear here:



Create a Training Plan Progress Details Report

3

Fill in the information about the report you want to create.

(a) **Report Title:** Type the name you want to give your report here.

(b) **Date Range:**
Use the dropdown menu to select a timeframe for your report. Date range will measure data from all course completions before or on the date you select.

If you want the report to show data from the training plan's entire history, select the **fixed range** option and leave the start and end dates blank.

The screenshot shows the 'Training Plan Progress Details' form. Annotations include: (a) pointing to the 'Report Title' field with the value 'Sample'; (b) pointing to the 'Date Range' dropdown menu; (c) pointing to the 'Report Schedule' dropdown menu; and (d) pointing to the 'Training Plans' section where 'No Training Plan is selected' is displayed. A light blue callout bubble with a lightbulb icon contains the text: 'TIP: Required fields are marked with a red bar.' Red arrows point from this bubble to the 'Report Title' and 'Date Range' fields.

This section provides a detailed view of the 'Date Range' options. It features a dropdown menu set to 'Fixed range'. Below this, it states: 'Date Range will be measured against the 'Completed Date' Report will include data for selected dates from 12:00 AM to 11:59 PM (EST)'. There are two input fields: 'Start Date' and 'End Date', each with a calendar icon to its right.

This section shows the 'Report Schedule' dropdown menu set to 'Weekly' and a second dropdown menu set to 'Monday'. Below these, a note states: 'An email notification will be sent to you every week on Monday when new report is available to download'.

(c) **Report Schedule:** This step is optional. If you select the weekly or monthly schedule option, you will receive an email notification when your report is ready to download on the day or date you choose.

(d) **Training Plan:** Select a training plan to run your report on. Search for a training plan by typing key words into the search bar.

Click the green plus (+) button to add a training plan. To remove a training plan, click the red (x) button.

This section shows the 'Select Training Plan' search bar with the text 'heart disease'. Below the search bar is a list of training plans. The first item, 'Preventing Heart Disease and Stroke', is highlighted with a green plus (+) button to its left. Below this, the 'Training Plans' section shows the same plan, 'Preventing Heart Disease and Stroke', with a red (x) button to its left, indicating it has been added to the selected list.

Create a Training Plan Progress Details Report (continued)

3

Cancel

Save

Training Plan Progress Details

Report TitleSample

1

Learner details, including registration status, in a selected Training Plan

Date Range

Last 30 days

Oct 31, 2023
Tuesday

Nov 30, 2023
Thursday

Date Range will be measured against the 'Completed Date'
Report will include data for selected dates from 12:00 AM to 11:59 PM (EST)

Report Schedule

None

Training Plans

No Training Plan is selected

Select Training Plan

Search by any part of training plan name

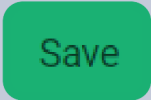
Advanced options

Fill in the information about the report you want to create.

(e) **Advanced options:** Use this section to add Groups to your report. Group options will vary depending on your organization.

Check the box beneath the “Report Settings” subsection if you would like to include inactive user accounts in your report.

(f) Click the green **Save** button to save your report settings.



(g) Click the yellow **Cancel** button to exit the report creation page.



Advanced options

Groups

Indiana

Add more groups

Search by any part of group name or by group ID

Report Settings

Include inactive (closed) user accounts

Create a Training Plan Progress Summary Graphs Report

4

Fill in the information about the report you want to create.

Cancel

Save

Training Plan Progress Summary Graphs

Report TitleSample 1

1

Visual representation of learner progress in selected Training Plans

Date Range

Last 30 days

Nov 1, 2023
Wednesday

Dec 1, 2023
Friday

Report will include data for selected dates from 12:00 AM to 11:59 PM (EST)

(a) **Report Title:** Type the name you want to give your report here.

(b) **Date Range:** Use the dropdown menu to select a timeframe for your report.

If you want the report to show data from the training plan's entire history, select the **fixed range** option and leave the start and end dates blank.

Date Range

Fixed range

Report will include data for selected dates from 12:00 AM to 11:59 PM (EST)

Start Date

Start Date

End Date

End Date

Create a Training Plan Progress Summary Graphs Report (continued)

4

Fill in the information about the report you want to create.

(c) **Report Schedule:** This step is optional. If you select the weekly or monthly schedule option, you will receive an email notification when your report is ready to download on the day or date you choose.

Report Schedule

None

Percentage Thresholds

Low %
50

High %
100

Training Plans

No Training Plans is selected

Add More Training Plans

Search by any part of training plan name

Advanced options

**TIP:** Required fields are marked with a red bar.

Report Schedule

Weekly

Monday

An email notification will be sent to you every week on Monday when new report is available to download

Percentage Thresholds

Low %
50


High %
100

(d) **Percentage thresholds:** Set your desired range for report's percentage of completion threshold.

(e) **Training Plan:** Select a training plan to run your report on. Search for a training plan by typing key words into the search bar. Click the green plus (+) button to add a training plan. To remove a training plan, click the red (x) button.

Select Training Plan


heart disease

 Preventing Heart Disease and Stroke

Training Plan

Training Plans

Selected Training Plan

 Preventing Heart Disease and Stroke

Advanced options


Groups

Indiana

Add more groups

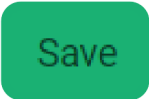
Search by any part of group name or by group ID

Report Settings

 ☒ Include inactive (closed) user accounts

(f) **Advanced options:** Use this section to add Groups to your report. Group options will vary depending on your organization. Check the box beneath the "Report Settings" subsection if you would like to include inactive user accounts in your report.

>> Click the green **Save** button to save your report settings.



>> Click the yellow **Cancel** button to exit the report creation page.



Create a Training Plan Summary Report

5

Cancel Save

Training Plan Summary

Report Title Sample

Overview of the selected Training Plan's courses, learners in the plan, completion statistics, and learner details

Date Range

Last 30 days Nov 1, 2023 Wednesday Dec 1, 2023 Friday

Date Range will be measured against the 'Completed Date'
Report will include data for selected dates from 12:00 AM to 11:59 PM (EST)

Report Schedule

None

Training Plans

No Training Plan is selected

Select Training Plan

Search by any part of training plan name

Advanced options

Fill in the information about the report you want to create.

(a) **Report Title:** Type the name you want to give your report here.

(b) **Date Range:**
Use the dropdown menu to select a timeframe for your report. Date range will measure data from all course completions before or on the date you select.

If you want the report to show data from the training plan's entire history, select the **fixed range** option and leave the start and end dates blank.

Date Range

Fixed range

Date Range will be measured against the 'Completed Date'
Report will include data for selected dates from 12:00 AM to 11:59 PM (EST)

Start Date End Date

Start Date End Date

(c) **Report Schedule:** This step is optional. If you select the weekly or monthly schedule option, you will receive an email notification when your report is ready to download on the day or date you choose.

Report Schedule

Weekly Monday

An email notification will be sent to you every week on Monday when new report is available to download

(d) **Training Plan:** Select a training plan to run your report on. Search for a training plan by typing key words into the search bar.

Click the green plus (+) button to add a training plan. To remove a training plan, click the red (x) button.

Select Training Plan

heart disease

Preventing Heart Disease and Stroke Training Plan

Training Plans

Selected Training Plan

Preventing Heart Disease and Stroke

Create a Training Plan Summary Report (continued)

5

Fill in the information about the report you want to create.

Advanced options e

Groups

Indiana

Add more groups

Search by any part of group name or by group ID

Report Settings

☒ Include inactive (closed) user accounts

- Click the green **Save** button to save your report settings.
- Click the yellow **Cancel** button to exit the report creation page.

Save

Cancel

Check the box beneath the “Report Settings” subsection if you would like to include inactive user accounts in your report.

Generate and Download Your Report

6

Sample Training Plan Progress Details

Report details

Date Range

from Nov 30, 2023 to Nov 30, 2023

Groups

Indiana

Training Plans

Work at Health (4032)

Include inactive (closed) user accounts

No

Created by

Role #31 Admin (Nov 30, 2023)

Updated by

Role #31 Admin (Dec 1, 2023)

Modified on Dec 1, 2023

Never generated

Generate

Edit

After saving your report, you will be directed to the “Report details” page.

- If you need to make changes to your report, click the **Edit** button.
- Click the **Generate** button to prepare your report to download.

The Generate button will turn into a blue **Download** button once your report is ready. Click the button to download a copy of the report to your computer.

Generated 9 minutes ago

Download

- Training Plan Progress Details Reports** download as a **.xlsx spreadsheet**.
- Progress Summary Graph Reports** download as a **.PDF file**.
- Training Plan Summary Reports** download as a **.xlsx spreadsheet**.

Click the three-dot action menu to view more report actions available to you. These include Download, Generate, Edit, Clone, and Delete.



TIP: Report results expire after a few days to ensure that the data you download is up to date. You can refresh expired reports to generate the same report with updated information.