Abbreviated Course Roster Reporting

Purpose:

This user guide explains how to create Abbreviated Course Roster Reports.

These reports provide a concise view of learner information with enhanced filtering and data selection options.

Administrative Roles with Access:

- **Course Attendance Manager**
- **Course Provider**
- **Course Session Manager**
- **Report Manager**

Table of Contents:

1 Learner Data Included in the Report

The Abbreviated Roster Report allows you to capture the optional data listed below. You can customize the reports according to your specific data needs. Please note that learners with a "Not Started" status at the time the report is generated will **not** be reflected in the results because it only displays data for learners who have moved into the "In Progress" status.

- **User ID**
- **State Name**
- **Last Login Date**
- **Course Format Type**
- **Session ID**
- **Session Location State**
- **Schedule Date**
- **Status Name**
- **Verified**
- **Registration Active**
- **Initial Launch Date**
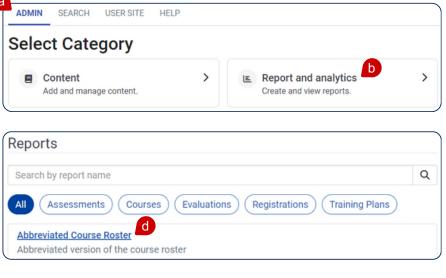- **Withdraw Date**
- **Course Grade Percentage**

- **Course Registration ID**
- **Zip Code**
- **Course ID**
- **Course Format**
- **Location Name**
- **Session Location Country**
- **Start Time**
- **Pre-Assessment Points**
- **Credit Type Name**
- **Registration Created**
- **Last Launch Date**
- **Withdrawn By**
- **Attempts Allowed**

- **City**
- **Country Name**
- **Course Title**
- **Clinical**
- **Session Location City**
- **Session Location Zip Code**
- **End Time**
- **Pre-Assessment Percentage**
- **Credit Amount**
- **Not Started Date**
- **Completion Date**
- **Course Grade Points**
- **Attempt Number**

>> **Step 3** explains how to narrow the data columns shown in your report.

Navigate to Abbreviated Course Roster Reports

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Go to the **(a) Admin** menu. Click on the **(b) Reports and analytics** tile. Select the **(c) Reports** tile. Then, select the **(d) Abbreviated Course Roster** report option from the list.

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

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3 Create an Abbreviated Course Roster Report

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

Cancel | Save

Abbreviated Course Roster

Report Title | Sample Title — (a)

ℹ Abbreviated version of the course roster

Registrations that are currently in the Not Started status will not display in this report.

Date Range — (b)

Previous Month | Nov 1, 2024 Friday → Nov 30, 2024 Saturday

Date Range will be measured against the 'Registration Date' of registration records
Last month is the previous calendar month from the date when the report is generated
Report will include data for selected dates from 12:00 AM to 11:59 PM (EST)

Report Schedule — (c)

Weekly | Monday

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

Filter by courses — (d)

+ Organization

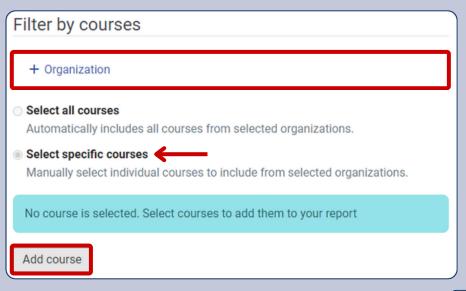**TIP:** Required fields are marked with a red bar. — (f)

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

(b) Date Range:
Use the drop down menu to select a timeframe for your report. Date range will measure data from all course registrations before or on the date you select.
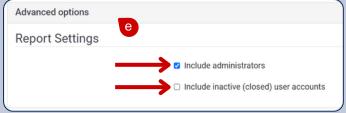If you want the report to show data from the course roster's history, select the **fixed range** option and leave the start and end dates blank.

(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) Filter by courses: Select a course to run your report on.

Filter by courses

+ Organization

○ **Select all courses**
Automatically includes all courses from selected organizations.

⦿ **Select specific courses**
Manually select individual courses to include from selected organizations.

No course is selected. Select courses to add them to your report

Add course

≫ Click the **+ Organization** button to limit your course search to courses from a specific organization.

≫ Check the **Select specific courses** box to choose individual courses for the report.

≫ Click the **Add course** button to search for courses to include in the report.

(e) Advanced options: Select additional report settings.

≫ Check the **Include administrators** box under the Report Settings section if you want to include registered administrators in the report.

Advanced options

Report Settings — (e)

☑ Include administrators

☐ Include inactive (closed) user accounts

≫ Check the **Include inactive (closed) user accounts** box under the Report Settings section if you want that group of registrants included in the report.

(f) Click the green **Save** button in the upper right hand corner to view the report details page.
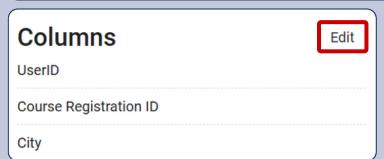
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Create an Abbreviated Roster Report (continued)

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On the **(g) Report details page**, you can manage your report data and make additional reporting selections. These include the learner data columns listed in **Step 1,** user attribute columns, and group selections.

Sample Title
Abbreviated Course Roster

Scheduled for Dec 23, 2024 **Generate**

g

Report details   Edit

Report Schedule
Weekly on Monday

Date Range
Previous Month

Filter by courses

Course	Organization
Preparing a Strong Rural Health Message	Rural Health Research Gateway

Include administrators
Yes

Include inactive (closed) user accounts
No

TIP: Review your reporting selections for accuracy.

MANAGE COLUMN SELECTIONS

Columns   Edit

UserID

Course Registration ID

City

>> Click the **Edit** button.

>> Check the boxes next to the columns you want to see in the report. Uncheck the boxes you do not want to see in the report. You can also select or unselect all columns.

>> Click the green **Save** button.

Cancel   Save

Columns   (At least one column is required)

Select All Unselect All

☑ UserID	☑ Course Registration ID	☑ City
☑ StateName	☑ Zip	☑ Country Name

ADDITIONAL REPORTING OPTIONS

User attributes columns   Edit

>> Click the **Edit** user attributes columns button to make Professional Role and Work Settings selections.

>> Check the box(es) next to the attributes of registrants you want to see displayed in the report.

Work Settings

☑ Academic / Educational Institution

☐ US Military/Uniformed Services

☐ Healthcare Services

User attributes columns

Professional Role

☐ Allied Health Professional

☑ Administrative Support Staff

☐ Biostatistician

Groups   Add

National   ✕

Settings   Edit

Include Inactive Groups: Yes

>> **Add** or **Edit** group selections visible in your report under the Groups section on the report details page.

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4 Generate and Download a Report

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

(a) If you need to make changes to your report, click the **Edit** button.

(b) Click the **Generate** button to prepare your report to download.

(c) 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. Abbreviated Course Roster Reports download as a **.xlsx spreadsheet.**

(d) Click the three-dot action menu to view more report actions available to you. These include Download, Generate, Edit, Clone, and Delete.
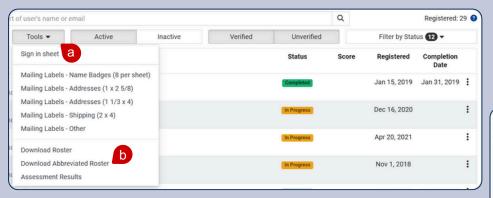
Sample Title 123
Abbreviated Course Roster

Modified on Aug 7, 2024
Never generated

Generate

Report details   Edit

Date Range
Previous Month

Filter by courses

Course	Organization
2004 04:CMED PHGRs "Diabetes, International Research and the Internet"	WVU School of Public Health

minute ago **Download**
Download
Generate
Edit
Clone
Delete

TIP: Report results expire after 48 hours to ensure that the data you download is up to date. You can refresh expired reports to generate the same report with updated information.

5 Use Report from Course Roster Page

You can access the report directly from a course's roster.

Tools ▾
Sign in sheet
Mailing Labels - Name Badges (8 per sheet)
Mailing Labels - Addresses (1 x 2 5/8)
Mailing Labels - Addresses (1 1/3 x 4)
Mailing Labels - Shipping (2 x 4)
Mailing Labels - Other
Download Roster
Download Abbreviated Roster
Assessment Results

Active   Inactive   Verified   Unverified   Filter by Status **12** ▾   Registered: 29

	Status	Score	Registered	Completion Date
	Completed		Jan 15, 2019	Jan 31, 2019
	In Progress		Dec 16, 2020	
	In Progress		Apr 20, 2021	
	In Progress		Nov 1, 2018	

(a) Click the **Tools** button on the Course Roster Page.

(b) Select the **Download Roster** option from the drop down menu.

(c) Complete the action items in **Step 4** to generate and download the Course Roster Report.

TIP: For more information on the Course Roster Page, view our Course Roster Management User Guide.

Preparing a Strong Rural Health Message (Export Abbreviated Roster)
Abbreviated Course Roster

Modified on Dec 16, 2024
Never generated

Generate

Report details   Edit

Date Range

Filter by courses

Course	Organization
Preparing a Strong Rural Health Message	Rural Health Research Gateway

Include administrators
Yes

Include inactive (closed) user accounts
No

Generated a minute ago   **Download**
Download
Generate
Edit
Clone
Delete

Organization

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