

Course Roster Reporting

Purpose:

This user guide explains how to create Course Roster Reports.

This type of report provides a comprehensive view of course-related learner information with enhanced filtering and data selection options.

Administrative Roles with Access:

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

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1

Learner Data Available in the Report

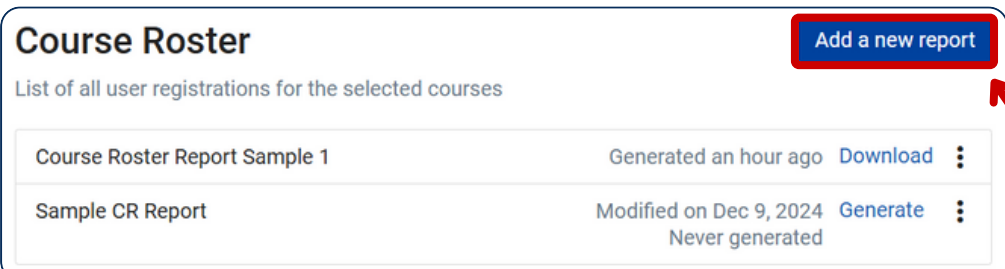
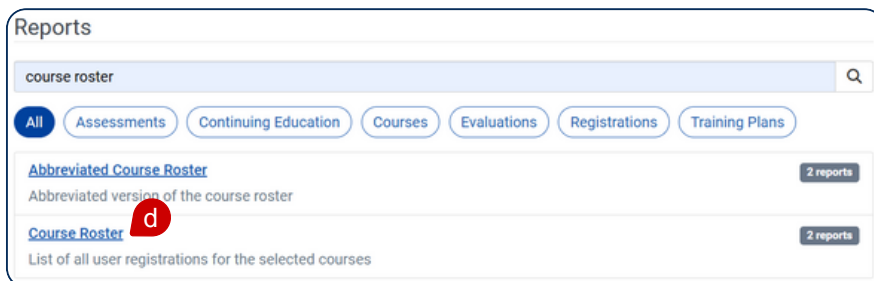
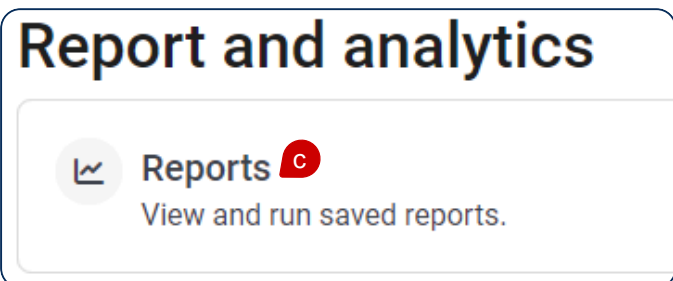
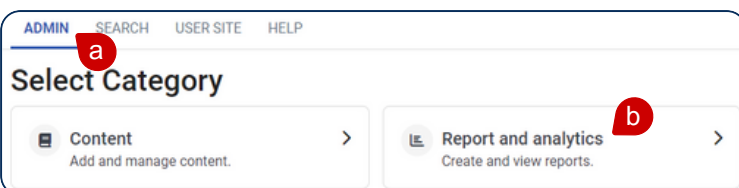
The Course Roster Report allows you to capture the optional data listed below. **Step 3** explains how to narrow the data columns shown in your report. You can customize the reports according to your specific data needs.

- | | | |
|--|---|--|
| <ul style="list-style-type: none"> • User ID • City • State/Territory • Zip/Postal Code • Country • Last Login Date • Course ID • Course Title • Course Format Type • Course Format • Clinical • Session ID • Location Name • Session Location City • Session Location State • Title • Bureau/Section | <ul style="list-style-type: none"> • Session Location Country • Session Location Zip Code • Schedule Date • Start Time • End Time • Course Registration ID • Registration Status • Registration Active • Credit Type • Credit Amount • Registration Created • Registration Created By • Initial Launch Date • Last Launch Date • Completion Date • Organization Name • User Group Path | <ul style="list-style-type: none"> • Withdraw Date • Withdrawn By • Verified • Verified By • Pre-Assessment Score • Course Grade Points • Course Grade Percentage • Attempts Allowed • Attempt Number • Professional License Number • Professional License Number “Other” • First Name • Last Name • Email • Department/Division • User Group Name |
|--|---|--|

Navigate to Course Roster Reports

2

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



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



Create a Course Roster 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) **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.

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

- >> Click the **+ Organization** button to limit your course search to courses from a specific course provider 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.

- (d) Click the green **Save** button in the upper right hand corner.
- (e) After saving your report, you will be directed to the Report details page. Review for accuracy.

Create a Course Roster Report (continued)

3

Manage your report data and make additional reporting selections on the report details page. These include the learner data columns listed in **Step 1** and user attribute columns.

MANAGE COLUMN SELECTIONS

Click the **Edit** button.

Course Roster Report Sample
Course Roster
Scheduled for Dec 16, 2024

Generate

Report details

Report Schedule
Weekly on Monday

Filter by courses

Course	Organization
Health Equity in Rural Communities	Public Health Foundation (PHF)

Columns

<input checked="" type="checkbox"/> UserID	<input type="checkbox"/> First Name	<input type="checkbox"/> Last Name
<input type="checkbox"/> Email	<input checked="" type="checkbox"/> City	<input checked="" type="checkbox"/> State/Territory
<input checked="" type="checkbox"/> Zip/Postal Code	<input checked="" type="checkbox"/> Country	<input checked="" type="checkbox"/> Last Login Date
<input checked="" type="checkbox"/> Course ID	<input checked="" type="checkbox"/> Course Title	<input checked="" type="checkbox"/> Course Format Type
<input checked="" type="checkbox"/> Course Format	<input checked="" type="checkbox"/> Clinical	<input checked="" type="checkbox"/> Session ID
<input checked="" type="checkbox"/> Location Name	<input checked="" type="checkbox"/> Session Location City	<input checked="" type="checkbox"/> Session Location State
<input checked="" type="checkbox"/> Session Location Country	<input checked="" type="checkbox"/> Session Location Zip Code	<input checked="" type="checkbox"/> Schedule Date

Edit

Columns

(At least one column is required)

Select All Unselect All

<input checked="" type="checkbox"/> UserID	<input type="checkbox"/> First Name	<input type="checkbox"/> Last Name
<input type="checkbox"/> Email	<input checked="" type="checkbox"/> City	<input checked="" type="checkbox"/> State/Territory
<input checked="" type="checkbox"/> Zip/Postal Code	<input checked="" type="checkbox"/> Country	<input checked="" type="checkbox"/> Last Login Date
<input checked="" type="checkbox"/> Course ID	<input checked="" type="checkbox"/> Course Title	<input checked="" type="checkbox"/> Course Format Type
<input checked="" type="checkbox"/> Course Format	<input checked="" type="checkbox"/> Clinical	<input checked="" type="checkbox"/> Session ID
<input checked="" type="checkbox"/> Location Name	<input checked="" type="checkbox"/> Session Location City	<input checked="" type="checkbox"/> Session Location State
<input checked="" type="checkbox"/> Session Location Country	<input checked="" type="checkbox"/> Session Location Zip Code	<input checked="" type="checkbox"/> Schedule Date

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.

USER ATTRIBUTES COLUMNS: PROFESSIONAL ROLE AND WORK SETTINGS

User attributes columns

Edit

Click the **Edit** button to make Professional Role and Work Settings selections.

Check the box next to an attribute to include it as a column in your report. Remember to save your selections.

Work Settings

<input checked="" type="checkbox"/> Academic / Educational Institution	<input type="checkbox"/> Official Public Health Agencies
<input type="checkbox"/> US Military/Uniformed Services	<input type="checkbox"/> Other Government Agencies (except Military)
<input type="checkbox"/> Healthcare Services	<input type="checkbox"/> Indian Health Service
<input type="checkbox"/> Tribal Health Sites	<input type="checkbox"/> Non-Profit Organization (except Healthcare)
<input type="checkbox"/> Private Industry (except Healthcare)	<input type="checkbox"/> Other (specify)

User attributes columns

Professional Role

<input type="checkbox"/> Allied Health Professional	<input type="checkbox"/> Administrator / Director / Manager
<input checked="" type="checkbox"/> Administrative Support Staff	<input type="checkbox"/> Animal Control Specialist / Veterinarian
<input type="checkbox"/> Childcare Provider	<input type="checkbox"/> Community Health Worker (CHW)
<input type="checkbox"/> Computer / Information Systems Specialist	

4 Generate and Download a Report

After saving your report and its data selections, generate and download your report.

- (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. 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.

Course Roster Report Sample

Scheduled for Dec 16, 2024

Generate

Course Roster

Report details

Edit

Report Schedule

Weekly on Monday

Filter by courses

Course	Organization
Health Equity in Rural Communities	Public Health Foundation (PHF)

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

of user's name or email

Registered: 29

Tools

Active

Inactive

Verified

Unverified

Filter by Status 12

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

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](#).

You can access the Course Roster Report directly from a course's roster.

Course Roster Report Sample

Scheduled for Dec 16, 2024

Generate

Course Roster

Report details

Edit

Report Schedule

Weekly on Monday

Filter by courses

Course	Organization
Health Equity in Rural Communities	Public Health Foundation (PHF)

Generated a minute ago

Download

Download

Generate

Edit

Clone

Delete

Organization