User Details Reporting

PDF version for download

Purpose:

This user guide explains how to create and access **User Account Details Reports**. These reports provide data about learners within your grouping structure.

Administrative Roles with Access:

- **Report Manager**

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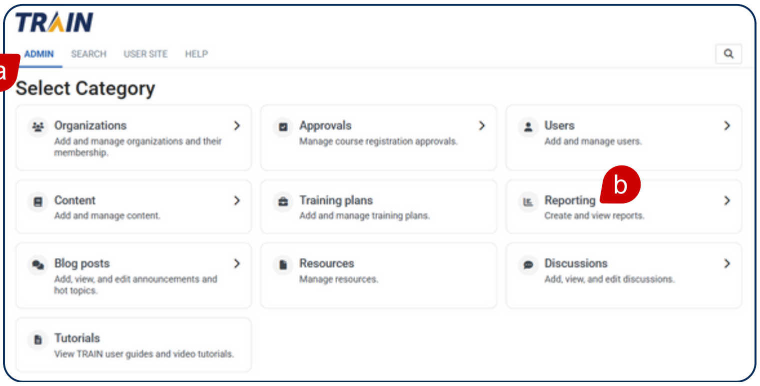
1 Learner Data Included in the Report

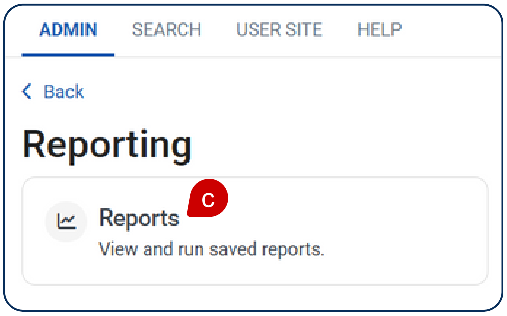
User Details Reports capture the data listed below. You can make data selections on the Report Edit page. View Step 3 for more details.

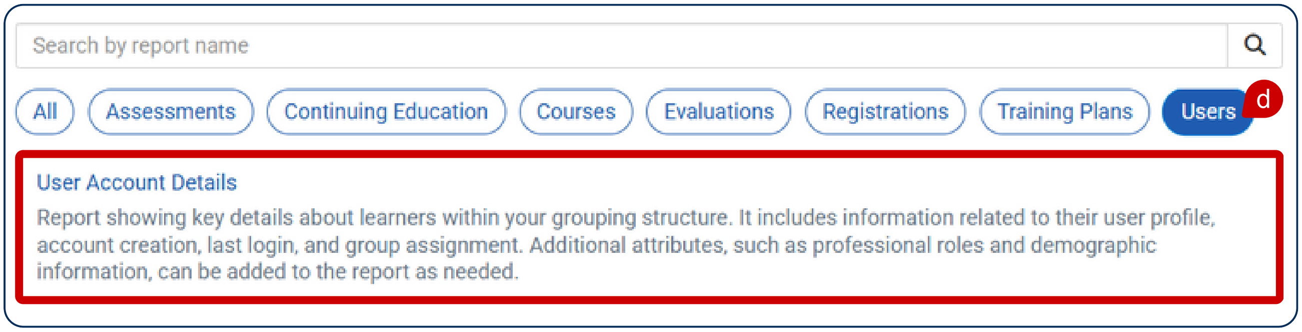
- User ID
- First Name
- Last Name
- Login Name
- Last Login
- Email
- Active
- TRUE/FALSE
- Country Name
- State/Territory
- Created Date
- Created By
- Updated Date
- Updated By
- Groups
- SSO ID
- Organization
- Department
- Bureau
- Phone number

2 Navigate to User Details Reports

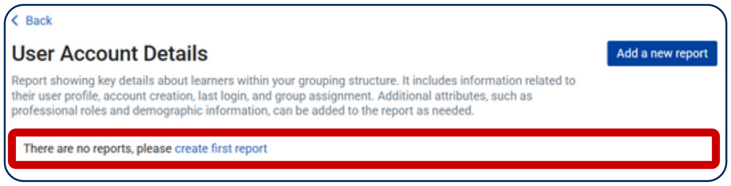
Go to the **(a) Admin** menu. Click the **(b) Reporting** tile and the **(c) Reports** tile. Then, select the **(d) Users** tab to filter the report selections. Select the **User Account Details Report.**







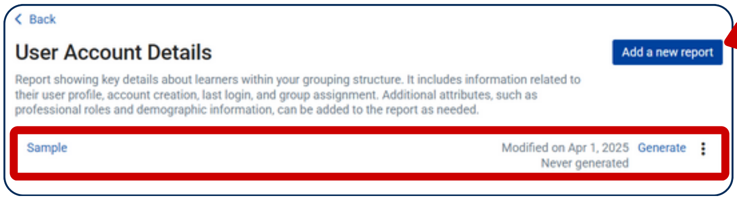
If you have not yet created a report, you will see this page:



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

Add a new report

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



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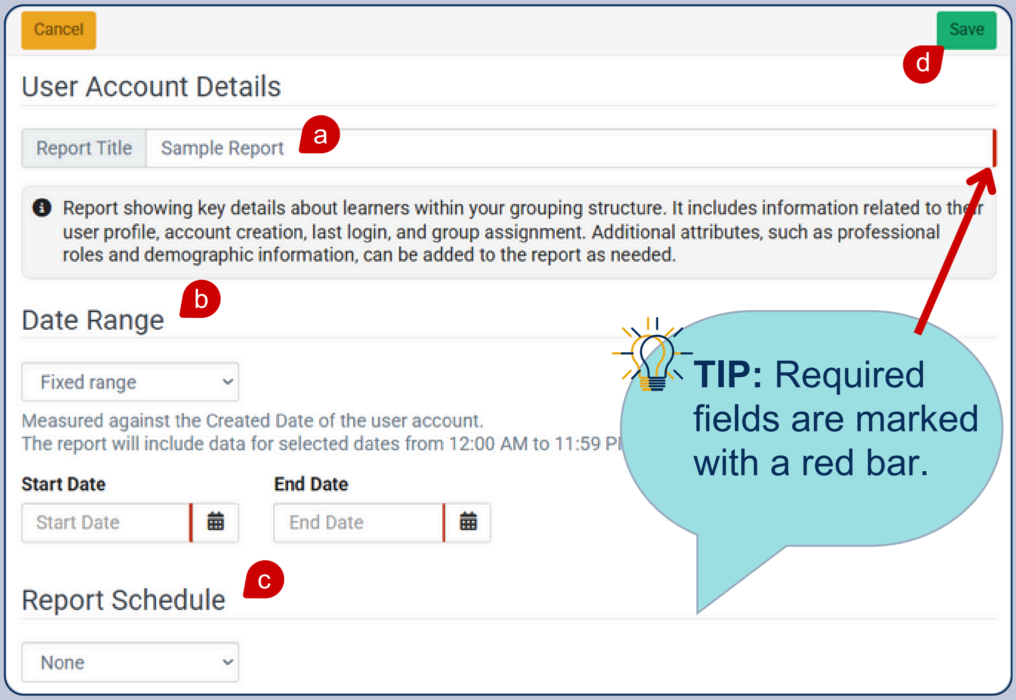
3 Create a User Details Report

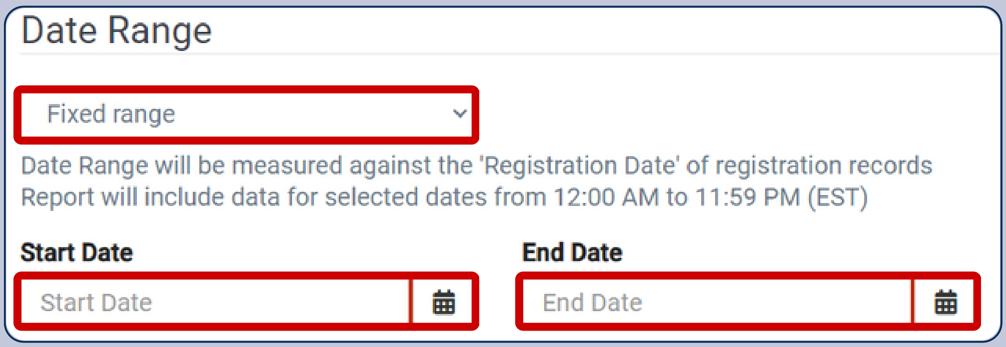
Fill in the information about the report you want to create.



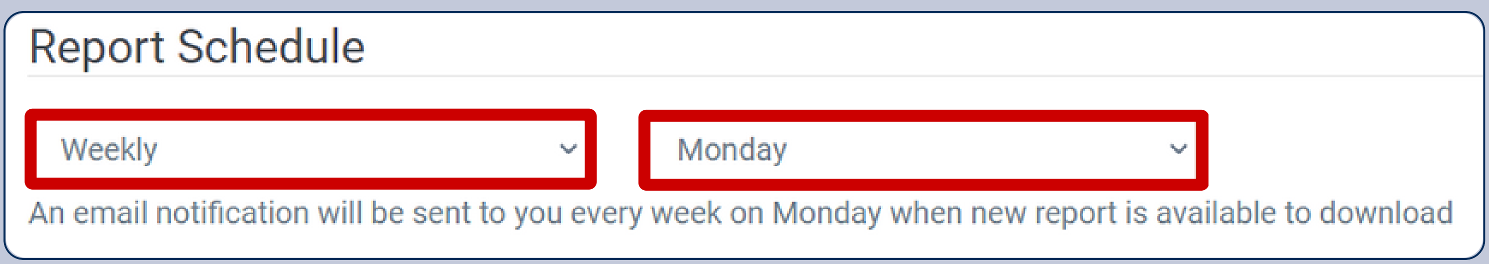
(a) Report Title: Type the name you want to give your report here.

(b) Date Range:
Use the drop down menu to select a timeframe for your report. Date range will measure data against the date the user account was created.

If you want the report to show data from a specific time, select the **fixed range** option and input a start and 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.



(d) Click the green **Save** button in the upper right hand corner.

After saving your report, you will be directed to the report details page. Review for accuracy.

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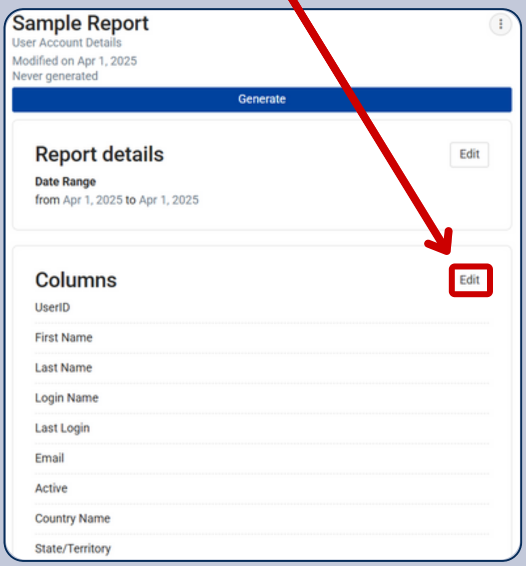
Create a User Details Report (continued)

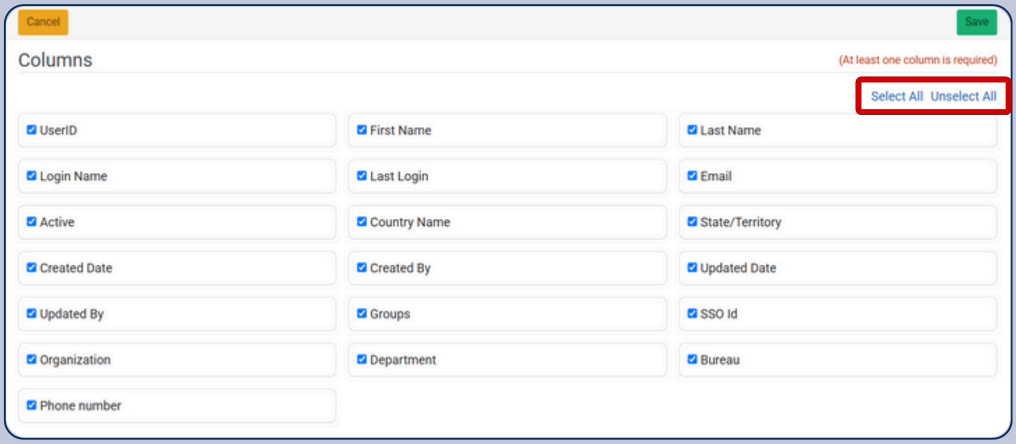
3

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.

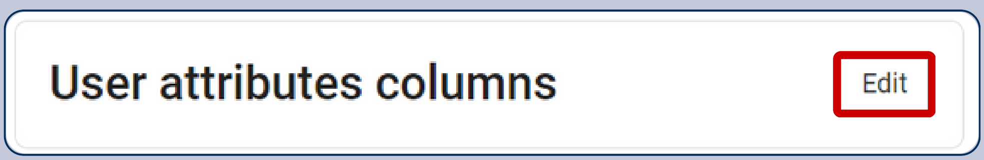




Check the boxes next to the columns you want to see in the report. Uncheck the boxes you do not want to see in the report. You can also select or unselect all columns.

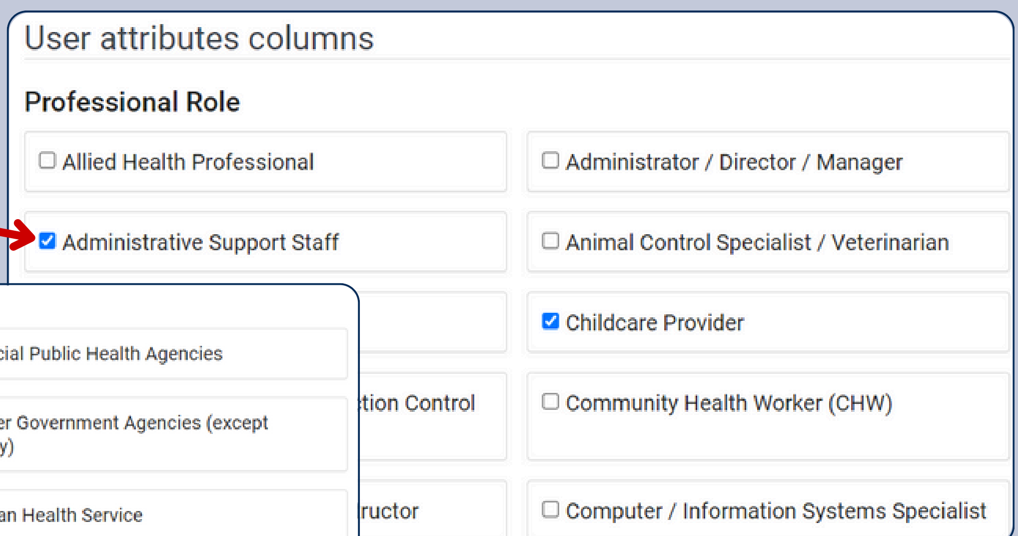
Click the green **Save** button.

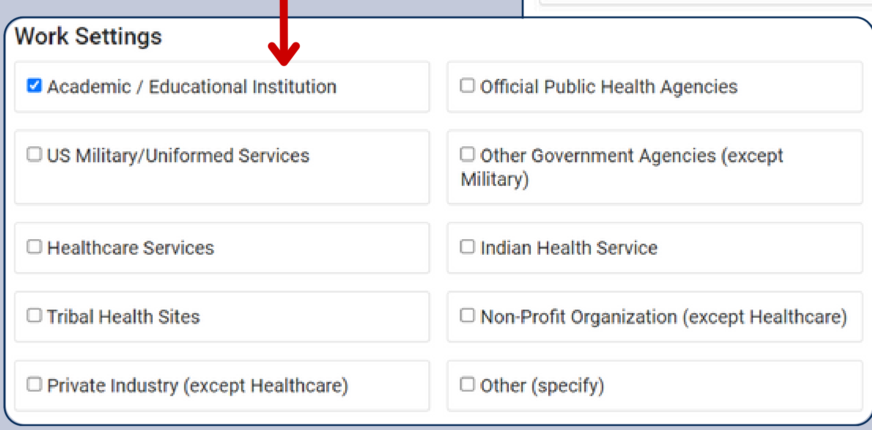
USER ATTRIBUTES COLUMNS



Click the **Edit** button to make user attribute data column selections.

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





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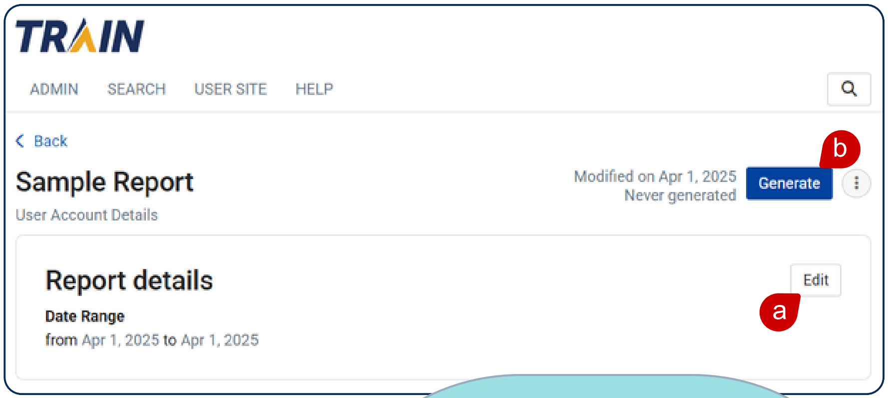
4 Generate and Download a Report

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

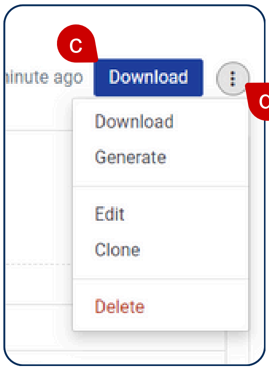


(a) If you need to make changes to your report, click the **Edit** button.

(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. User Details 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.



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.

For more reporting guidance, view the **Reporting** section on the TRAIN tutorial page.

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