

User Details Reporting

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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

Navigate to User Details Reports

2

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**.

ADMIN

SEARCH

USER SITE

HELP

Select Category

Organizations
Add and manage organizations and their membership.

Approvals
Manage course registration approvals.

Users
Add and manage users.

Content
Add and manage content.

Training plans
Add and manage training plans.

Reporting
Create and view reports.

Blog posts
Add, view, and edit announcements and hot topics.

Resources
Manage resources.

Discussions
Add, view, and edit discussions.

Tutorials
View TRAIN user guides and video tutorials.

ADMIN

SEARCH

USER SITE

HELP

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Reporting

Reports
View and run saved reports.

Search by report name

AllAssessmentsContinuing EducationCoursesEvaluationsRegistrationsTraining PlansUsers

User Account Details

Report showing key details about learners within your grouping structure. It includes information related to their user profile, account creation, last login, and group assignment. Additional attributes, such as professional roles and demographic information, can be added to the report as needed.

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

< Back

Add a new report

User Account Details

Report showing key details about learners within your grouping structure. It includes information related to their user profile, account creation, last login, and group assignment. Additional attributes, such as professional roles and demographic information, can be added to the report as needed.

There are no reports, please create first report

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

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

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Add a new report

User Account Details

Report showing key details about learners within your grouping structure. It includes information related to their user profile, account creation, last login, and group assignment. Additional attributes, such as professional roles and demographic information, can be added to the report as needed.

SampleModified on Apr 1, 2025GenerateNever generated

Add a new report

Create a User 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 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.

Cancel

Save

User Account Details

Report Title

Sample Report

Report showing key details about learners within your grouping structure. It includes information related to their user profile, account creation, last login, and group assignment. Additional attributes, such as professional roles and demographic information, can be added to the report as needed.

Date Range

Fixed range

Measured against the Created Date of the user account.

The report will include data for selected dates from 12:00 AM to 11:59 PM

Start Date

Start Date

End Date

End Date

Report Schedule

None

TIP: Required fields are marked with a red bar.

Date Range

Fixed range

Date Range will be measured against the 'Registration Date' of registration records

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

Start Date

Start Date

End Date

End Date

Report Schedule

Weekly

Monday

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

(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.

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.

Sample Report

User Account Details

Modified on Apr 1, 2025

Never generated

Generate

Report details

Date Range

from Apr 1, 2025 to Apr 1, 2025

Columns

UserID

First Name

Last Name

Login Name

Last Login

Email

Active

Country Name

State/Territory

Edit

Columns

(At least one column is required)

Select All Unselect All

<input checked="" type="checkbox"/> UserID	<input checked="" type="checkbox"/> First Name	<input checked="" type="checkbox"/> Last Name
<input checked="" type="checkbox"/> Login Name	<input checked="" type="checkbox"/> Last Login	<input checked="" type="checkbox"/> Email
<input checked="" type="checkbox"/> Active	<input checked="" type="checkbox"/> Country Name	<input checked="" type="checkbox"/> State/Territory
<input checked="" type="checkbox"/> Created Date	<input checked="" type="checkbox"/> Created By	<input checked="" type="checkbox"/> Updated Date
<input checked="" type="checkbox"/> Updated By	<input checked="" type="checkbox"/> Groups	<input checked="" type="checkbox"/> SSO Id
<input checked="" type="checkbox"/> Organization	<input checked="" type="checkbox"/> Department	<input checked="" type="checkbox"/> Bureau
<input checked="" type="checkbox"/> Phone number		

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

User attributes columns

Edit

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.

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

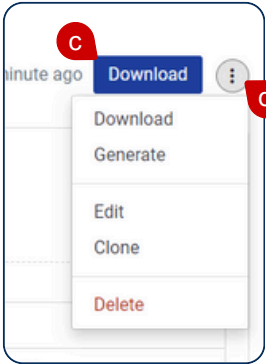
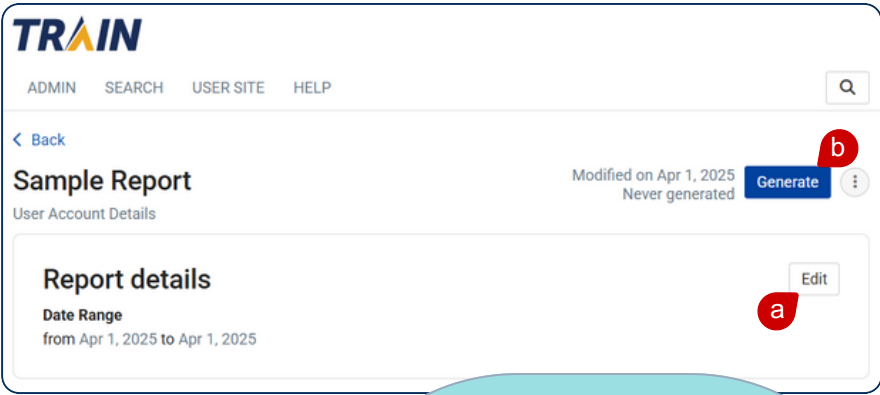
<input type="checkbox"/> Allied Health Professional	<input type="checkbox"/> Administrator / Director / Manager
<input checked="" type="checkbox"/> Administrative Support Staff	<input type="checkbox"/> Animal Control Specialist / Veterinarian
	<input checked="" type="checkbox"/> Childcare Provider
	<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. 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](#).