

Abbreviated Course Roster Report

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Introduction

Purpose: This job aid introduces the Abbreviated Course Roster report, which provides a more concise view of Learner information and includes enhanced filtering and data selection options. It includes images to illustrate key points.

Access:

- The **Report Manager**, **Course Session Manager**, and **Course Attendance Manager** will be able to access this report for courses that are assigned to the Group and sub-groups to which they belong.
- **Members of Course Provider Organizations with Course Provider and Course Report Manager* permissions** will be able to access this report for courses that are associated to their Organization.

** New role available in December 2021*

Related Functionality:

- Date Range options
- Report scheduler capability
- Single or multiple course selection
- User Attributes section with selectable Professional Role(s) and Work Settings categories (visibility based on Role)
- Advanced Options for Group(s) selection and Report Settings to include/exclude administrators and/or inactive user accounts

Additional Notes:

The Abbreviated Roster report relies on a particular date field called Registration Date in order to retrieve course registrations. The value of the field is populated when the course moves into the In Progress status, not when the Learner signs up for a course (or is assigned to it by an Administrator). Therefore, Learners who are in a Not Started status at the time the report is generated will not be captured in the results.

Learner data included in the report

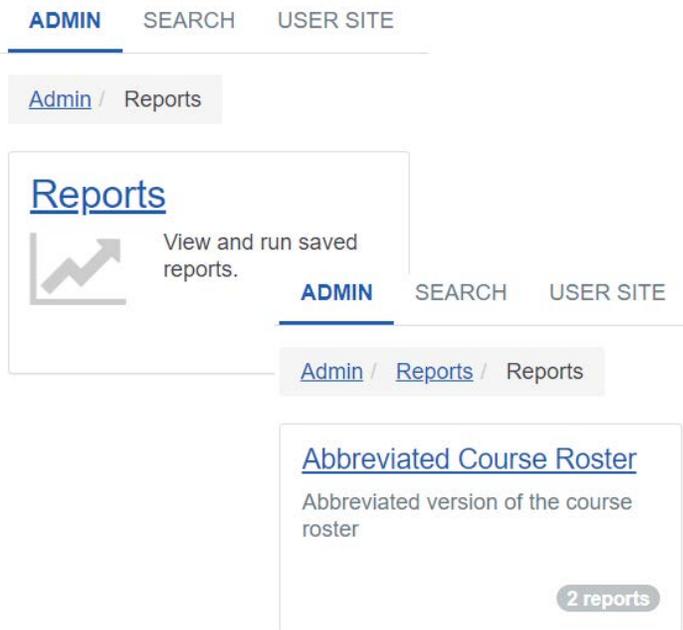
The Abbreviated Roster report is a condensed version of the original Course Roster report, which is still available for use in its original location (Admin >Reports> Course Roster). In the new report, the following fields are captured:

UserID	Location Name	Registration Active
Course Registration ID	Session Location City	Registration Created
City	Session Location State	Not Started Date
StateName	Session Location Country	InitialLaunchDate
Zip	Session Location Zip Code	LastLaunchDate
Country Name	Schedule Date	CompletionDate
LastLoginDate	Start Time	Withdraw Date
Course ID	EndTime	Withdrawn By
Course Title	StatusName	CourseGradePoints
Course Format Type	PreAssessmentScore	CourseGradePercentage
Course Format	Verified	Attempts Allowed
Clinical	CreditTypeName	Attempt Number
Session ID	CreditAmount	Any selected User Attributes

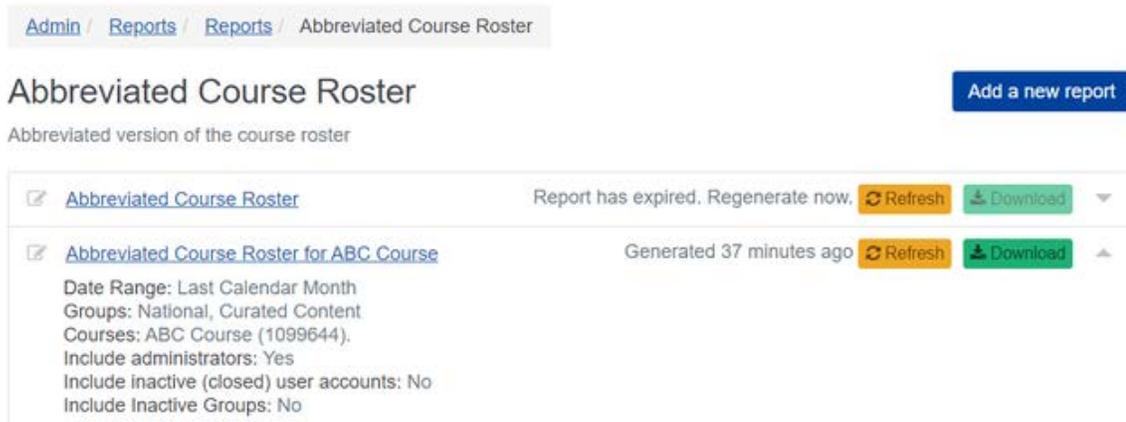
How to find the report in Admin Reports

Note: Details on each section of the Report can be found starting on page 9 of this job aid.

1. In the **Admin section**, click on the **Reports** tile, and then click on the **Reports (View and run saved reports)** tile.
2. Click on the Abbreviated Course Roster header to create or access reports.



3. On the Abbreviated Course Roster menu page, saved reports are displayed along with an option to create a new report. Click the Expand arrow to the right of a report to view details on the same screen.



How to create a new report in Admin Reports

1. Click the blue button to add a new report.
2. An Edit Report page will display with a default Report Title of “Abbreviated Course Roster.” Replace this with a unique name for your report.
3. To leave this page without saving any selections, click the orange Cancel button.
4. Make selections as needed in each area (details below in the Report Options section starting on page 9) and click the green Save button. This will return you to the Report menu page where you will see your new report.

How to generate and download a report in Admin Reports

1. New reports without a Schedule will generate automatically upon being saved.
2. Reports with a selected Schedule of Weekly or Monthly will display a Generate Now prompt on the report menu page.
3. To ensure freshness of data, stored Report results will expire after three days.
4. Click Refresh to generate any report on demand.
5. Click Download to download the report. The report will be saved in your computer’s Downloads folder.

Abbreviated Course Roster

Add a new report

Abbreviated version of the course roster

Abbreviated Course Roster	Report has expired. Regenerate now.	Refresh	Download	▼
Abbreviated Course Roster for ABC Course	Generated 2 hours ago	Refresh	Download	▼
Abbreviated Course Roster weekly	Generate Now	Refresh	Download	▼

6. The downloaded report file has an updated view and includes data summary and highlighted column headers for increased usability. TIP: Data can be text-wrapped within a cell, so expand the cell view window.

7. Records in the downloaded file for a single course will be sorted by the UserID.

8. If there are multiple courses selected for the report, records will be sorted by Course, then by UserID.

UserID	Course Registration ID	City	StateName	Zip	Country Name	LastLoginDate	Course ID
644	22633734	Washington, DC	District of Columb	20005	United States	24/Sep/2021	1099644
3792639	22633723	Washington	District of Columb	20005	United States	22/Sep/2021	1099644

B3

User Attributes : Professional Role

Allied Health Professional: Dietitian, Medical Assistant, Medical Imaging Professional, Physician Assistant, Rehabilitation Professional, Speech, Language, or Audiology Professional, Other Allied Health, Occupational Therapy Practitioner

Computer / Information Systems Specialist: Yes

Emergency Responder: Emergency Preparedness / Management Personnel

Environmental Health Professional: Hazardous Substances Professional

Finance and Budget Staff: Yes

Government Official: Board of Health Member, Other Elected / Appointed Official (except Public Health)

Health Educator: Yes

Nurse: Advance Practice Nurse (APRN), Licensed Practical Nurse (LPN) / Licensed Vocational Nurse (LVN), Registered Nurse (RN or RN,C), Nurse Practitioner, Certified Registered Nurse Practitioner (CRNP)

Non-Physician Clinician: Chiropractor, Optician, Optometrist, Midwife, Podiatrists, Other Clinician (specify) _____

Work Settings

Official Public Health Agencies: Federal, Local, Regional / Area, State / Territory, Include administrators : Yes, Include inactive (closed) user accounts : Yes, Include Inactive Groups : No

User Attributes : Professional Role
2021/09/27 - 2021/11/03
User Attributes : Professional Role

How to edit an existing report in Admin Reports

1. Click the edit icon to the left of the report name.
2. Change any area of the report as needed and click the green Save button at the top right of the page.

Cancel Save

 Edit Report

Report Title **Abbreviated Course Roster for ABC Course** Report Type: **Abbreviated Course Roster**

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

Date Range

Last Month

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 Schedule

None

Courses

Selected courses

 ABC Course

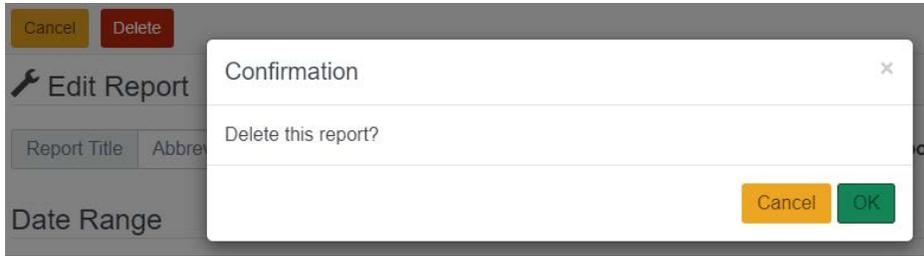
Select courses:

1099644

 ABC Course Text-based (print and electronic based)

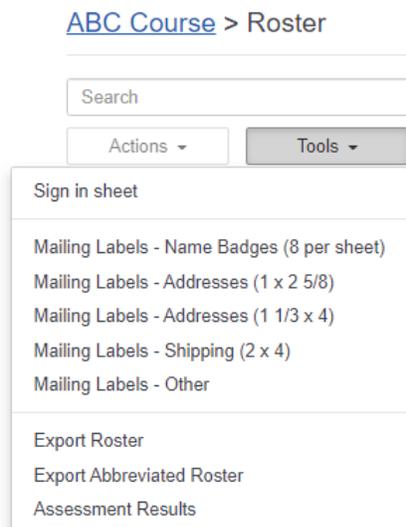
How to delete an existing report in Admin Reports

1. Open the report to edit it.
2. Click the red Delete button.
3. Click OK in the confirmation prompt to delete.
4. Click the orange Cancel button to cancel without deleting.



How to find and use the report in the Course Roster

1. Go to the Course Roster (Admin > Content > Find and edit existing content > search for course > click Edit icon > select Roster).
2. In the **Course Roster**, click on the **Tools dropdown menu**. (Note: This access point does not include Schedule options or the ability to save the report long-term.)
3. Select Export Abbreviated Roster.



4. Make selections for Date Range and User Attributes as needed and generate the report.

Abbreviated Course Roster

Date Range

Last Month

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

Courses

Selected courses

ABC Course

Select courses:

Search by ID or any part of name

User Attributes

Professional Role

Work Settings

Advanced options

Generate Report

Close

5. Once generated, the pop-up window will include Refresh and Download buttons.

6. If the report pop-up window is closed with either the Close button or the X in the top right corner, the generated report will be kept until you leave the Roster page.

7. To re-access the report before leaving the Roster page, click the Export Abbreviated Roster option again.

Abbreviated Course Roster

Date Range: Last Calendar Week
Groups: National, Curated Content
Courses: ABC Course (1099044)
User Attributes:
Professional Role
Allied Health Professional: Dietitian
Include administrators: Yes
Include inactive (closed) user accounts: No
Include inactive Groups: No

Download

Generated 6 minutes ago

Refresh

Close

Report Options

Report Title: Create a unique name for your report.

Date Range: Choose a date range for your report.

1. Last Month is the default option and will reflect the previous calendar month from the date the report is generated.
2. Fixed will include data for a selected date range.
3. Last Week will include data in the previous calendar week (Sunday-Saturday) from the date the report is generated.

Date Range

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

Date 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

End Date

Date Range

Date Range will be measured against the 'Registration Date' of registration records
Last week is the previous calendar week (Sun-Sat) from the date when the report is generated

Report Schedule: Choose a schedule on which you would like to auto-generate the report. An email will be sent to you when the report is available for download.

1. None is the default and will require manual generating of the report on demand.
2. Weekly will generate the report every week on a date of your choice.
3. Monthly will generate the report monthly on the day of your choice.

Report Schedule

Weekly

An email notification will be sent to

- Sunday
- Monday
- Tuesday

Report Schedule

Monthly

An email notification will be sent to

- 1
- 2
- 3

Courses: Select one or multiple courses to include in the report.

1. Search by course ID or any part of the course name.
2. From the search results, click the green add icon to add the course(s) to the report.
3. To remove a course from the report, click the red X icon next to the name. A prompt will display. Click OK to remove or Cancel to exit without removing.

Courses

Selected courses	
<input type="checkbox"/>	ABC Course
<input type="checkbox"/>	ABC's of Pandemic Influenza
<input type="checkbox"/>	The ABC's of Clean

Select courses:

ABC

<input type="checkbox"/>	ABC Course	<input type="button" value="Text-based (print and electronic based)"/>
<input type="checkbox"/>	The ABC's of Clean	<input type="button" value="Audiotape/Videotape"/>
<input type="checkbox"/>	ABC's of Pandemic Influenza	<input type="button" value="Web-based Training - Self-study"/>
<input type="checkbox"/>	ABC's of Asthma for Child Care Workers (1047617)	<input type="button" value="Web-based Training - Self-study"/>
<input type="checkbox"/>	ABC's of Safe and Healthy Child-Care Handwashing and Diapering	<input type="button" value="Audiotape/Videotape"/>

User Attributes: Similar to the original Course Roster Report, the user attributes of Professional Role and Work Settings are available. In the Abbreviated report, however, you can make selections of which, if any, you want to include.

1. Expand the Professional Role or Work Settings section by clicking the Expand arrow to the right.
2. Each Role and Work Setting has a button with an eye icon. To select an item to be visible in the report, click the button so it changes from a clear box with a slash through the icon to a dark box with no slash through the icon.



3. Some items have sub-options from which you can choose. For many attributes, there are radio buttons to select as follows:

- a) All – include any learner who selected *something* for the attribute
- b) Yes – include only learners who selected “Yes” for the attribute
- c) No – include only learners who selected “No” for the attribute

Cancel Save

User Attributes

Professional Role ▼

Work Settings ▲

Academic / Educational Institution Select All 

- University / Higher Education
- K-12
- Pre- K / Childcare

Official Public Health Agencies Select All 

- Federal
- Local
- Regional / Area
- State / Territory

Military All Yes No 

Other Government Agencies (except Military) All Yes No 

Advanced Options: This segment offers a number of customizable items.

1. Groups: Default Groups based on the user's Role are pre-selected.

- a) To remove a Default Group, click the red X button.
- b) To add more Groups, use the Search function.
- c) To include Inactive Groups, check the box next to the prompt.

2. Report Settings: You can choose to include or exclude particular accounts.

- a) Administrators are included by default. To remove them, uncheck the box next to the prompt.
- b) To include inactive user accounts, check the box next to the prompt.

Advanced options 

Groups

Selected groups

	Curated Content
	National

Add More Groups

Include Inactive Groups

Search by any part of group name or by group ID   

Report Settings

Include administrators

Include inactive (closed) user accounts