



Year End Preparation

Reporting FAQs

"I want to see a report showing who hasn't yet finished their required training for this year."

The Quick Status Report (QSR) is great for showing specific types of required training like Incomplete or Overdue.

1. Click **Reports** under the menu.
2. Launch the **Quick Status Report**.
3. Select **Incomplete** (or **Overdue**) **Training** from the Training dropdown menu.
4. Enter a **Date Range** (all rule assignments with a due date in between this date range will be included in the results. To include manually assigned items, check the box "Include Individual Learning Plan Items Not Assigned by a Rule").
5. Click **Execute Search**.
6. Export your results by clicking **XLSX**.

"I'm being asked for a report showing just the latest completion statuses of certain courses taken over the last year."

Assuming all training was assigned via rules, the best option is to run the Rule Compliance Report – Export. Run this report and filter the results down by course in excel to show just what you need.

1. Click **Reports** under the menu.
2. Launch the **Rule Compliance Report – Export** (4th report down on the reports desk).
3. Click **None Selected** next to the Rule field.
4. Select **Show Active Rules Only**, although this can be changed at your discretion if rules have closed.
5. Click **Apply Filter**.
6. Click **Select All**.
7. Click **Execute Search**.
8. Click on the popup to open the report in excel.
9. In Excel, hold **Ctrl + A** to highlight all results.
10. Click on the **Data** tab and select the **Filter** option.
11. Click the downward facing arrow next to top of column G (course title), deselect "Select All," and select only the courses you need to report on.
12. Click **Ok**.



Reporting FAQs (continued)

"How do I get a list of everyone's Positions, Managers, Email, etc.?"

This is a very simple task that can be performed with the User Data Report. You can use this Report to determine what changes need to be made to profiles, and then use the Batch Edit feature under the People tab within Administration to make these bulk changes.

1. Click **Reports** under the menu.
2. Launch the **User Data Report**.
3. Click **Execute Search**.
4. Click the **Field Chooser** button to drag in / out additional column headers.

Copying Rules for 2021

"How do I set up training for the new year?"

You can copy or duplicate rules for the next compliance year, which can significantly reduce the setup process time.

1. Within **Administration**, click under the **Rules** tab.
2. Select a filter (Active or Closed) on the left-hand side depending on the current status of the rules you are intending to copy.
3. Check the box next to each rule you want to bring over to the new year.
4. Click **Copy Rule**.
5. Enter in a **New Rule** name, a **New Start Date**, and check the box "**Add a Year to All Requirements.**"
6. Click **Save**.
7. Click on **Draft** on the left-hand side.
8. **Edit** one of the copies rules.
9. Navigate to each tab (General, People, Courses, Dates) to make sure all the information is accurate.
10. Under the **General** tab, change the status from **Draft** to **Active**.
11. Click **Save**.
12. Repeat steps 7-11 for each new rule.

Note: Rules will not process until their Start Date.