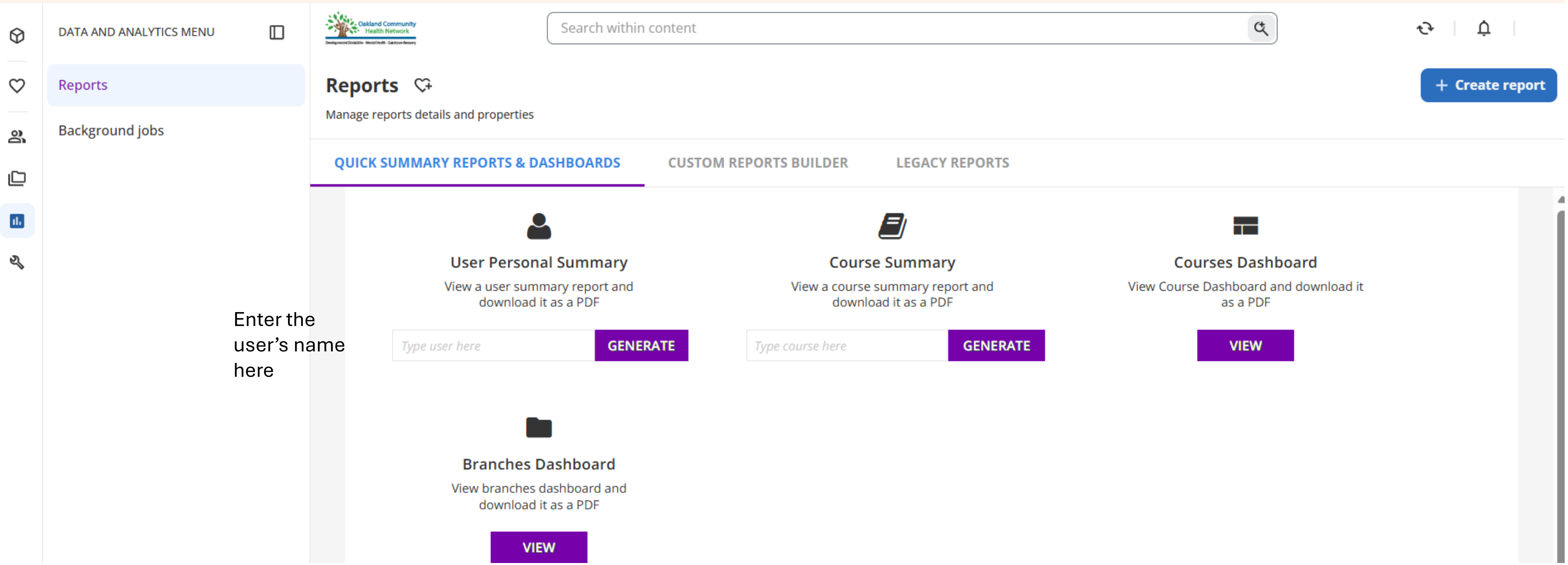
Oakland Community Health Network

Developmental Disabilities • Mental Health • Substance Recovery

Creating Reports

Quick Summary Reports

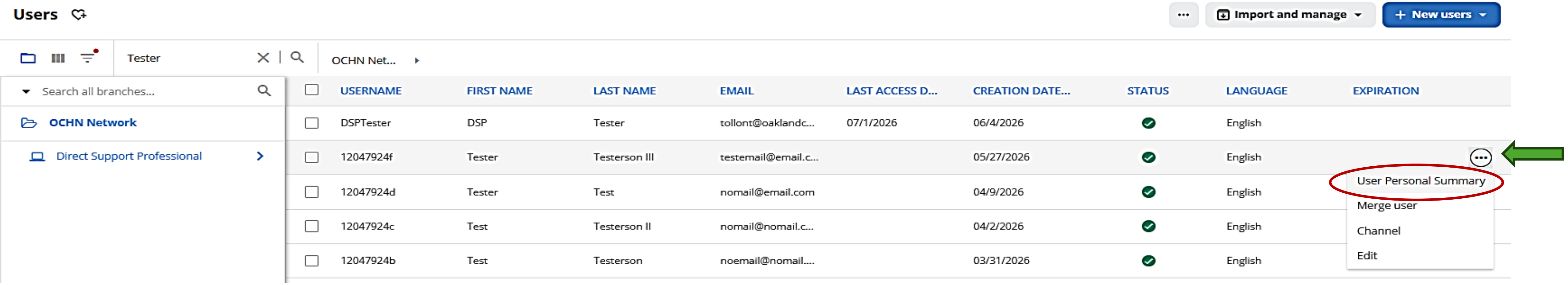


Enter the user’s name here

How to View a User’s Personal Summary

<u>Option 1</u>

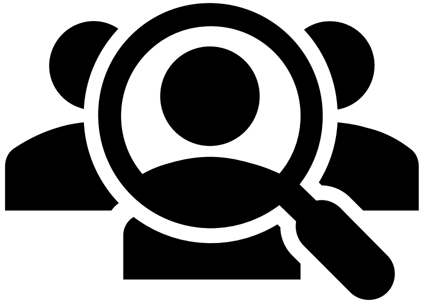
1. From the **Users** menu, select your branch and locate the user whose summary you want to review.
2. Hover over the end of the user's row and click the **ellipsis menu** (three dots).
3. From the drop-down menu, select **User Personal Summary**.

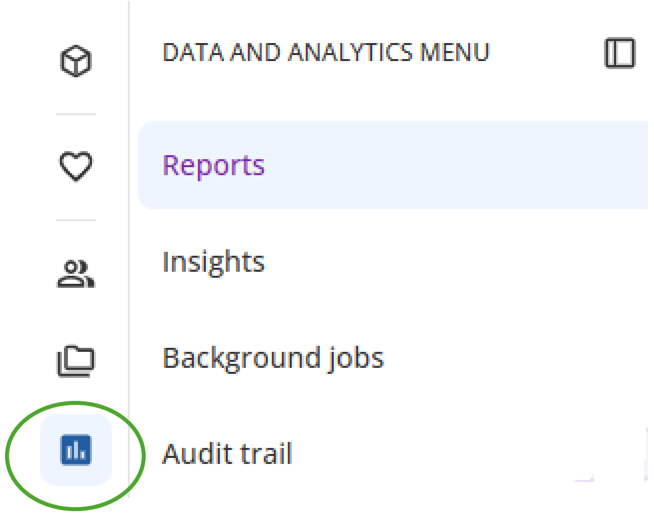


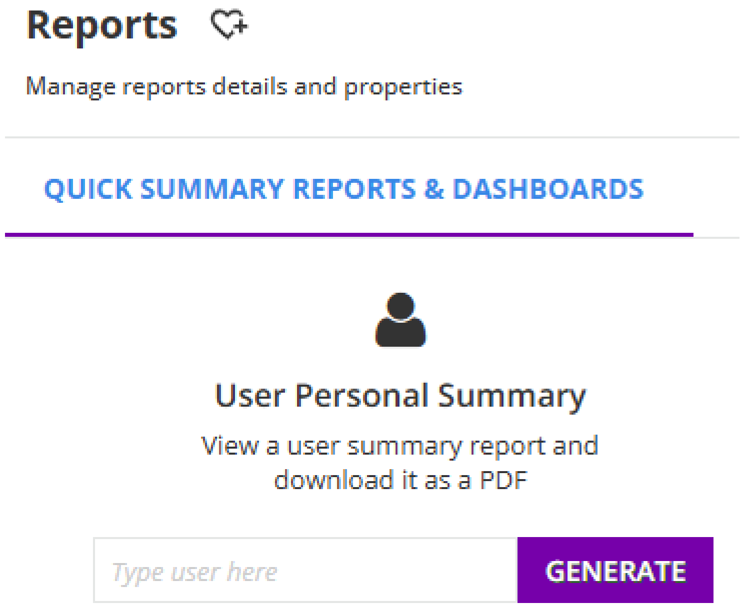
How to View a User's Personal Summary

<u>Option 2</u>

1. From the navigation menu, select the reports icon.
2. On the **QUICK SUMMARY REPORTS & DASHBOARDS** page there is a "User Personal Summary" report.
3. Enter the name of the user you would like to view in the search box.
4. Click "Generate" and it will bring up the user's personal summary.

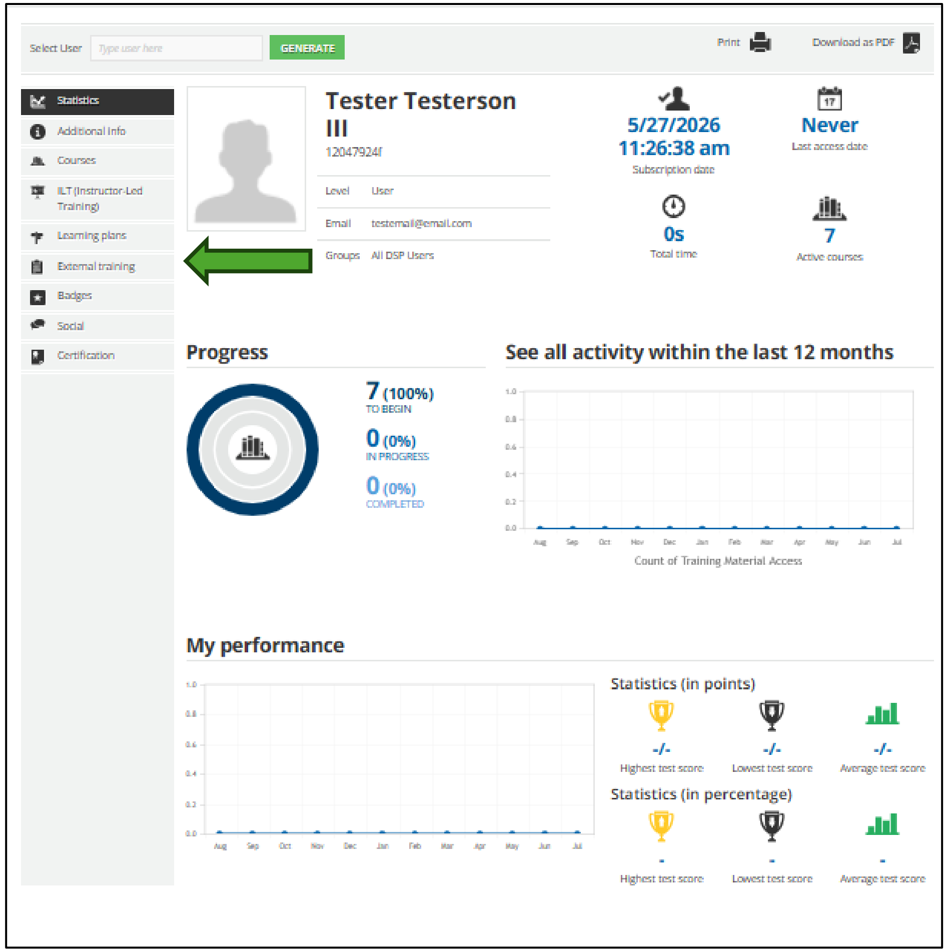


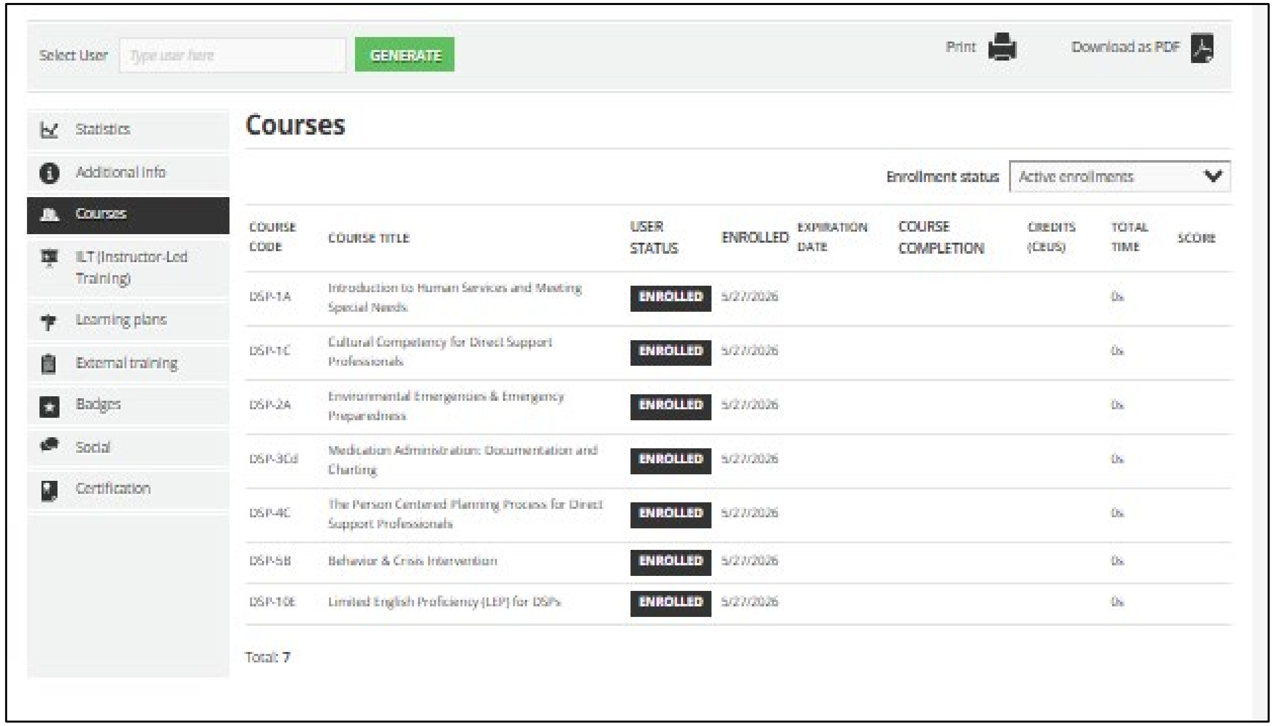




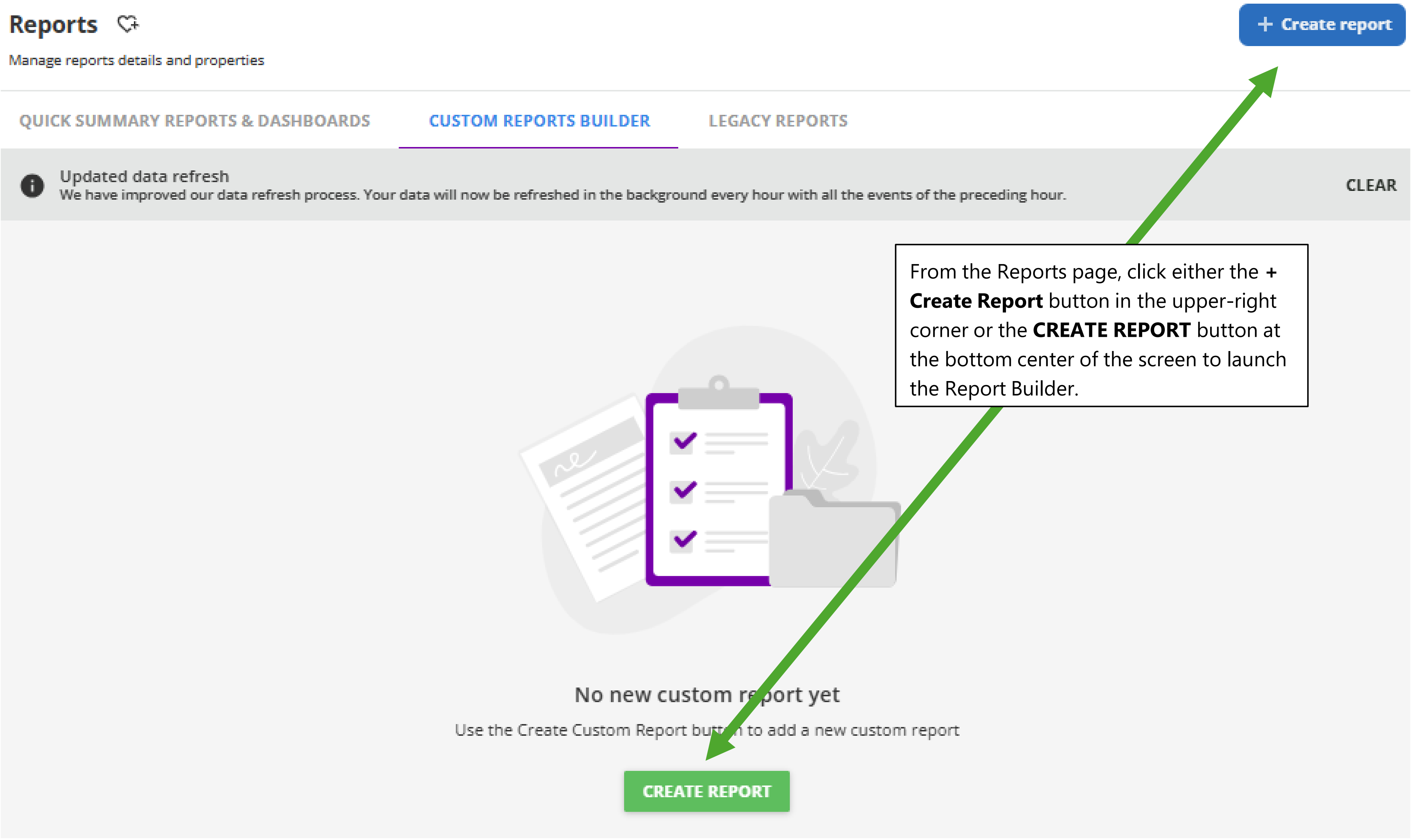
User Personal Summary Report

From the users summary report you can view the users eLearning courses, Instructor Led Training (ILT), trainings, learning plans, and certifications from the menu on the left side of the screen.





Creating Custom Reports



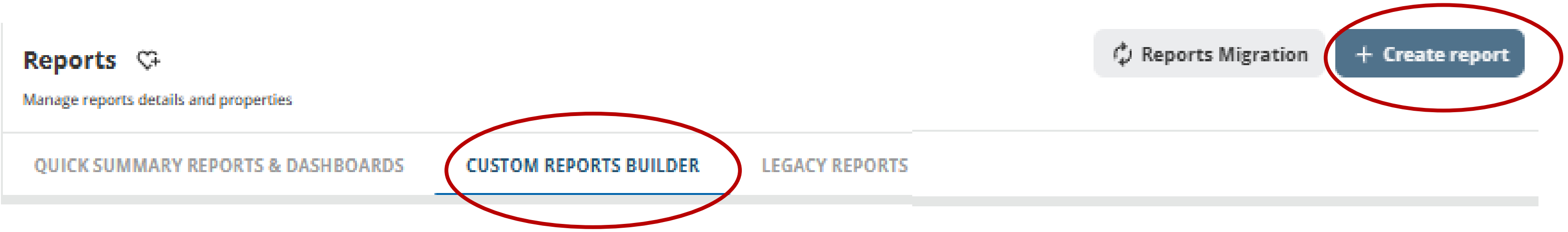
From the Reports page, click either the **+ Create Report** button in the upper-right corner or the **CREATE REPORT** button at the bottom center of the screen to launch the Report Builder.

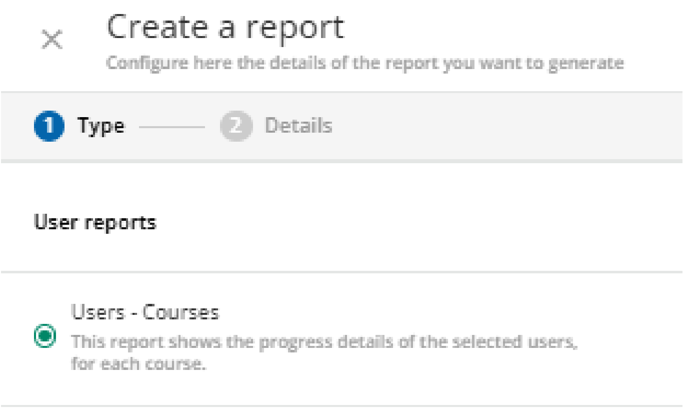
Creating New Custom Report

Step 1: Open the **Navigation menu** and click the **Data and Analytics** (chart icon), then select **Reports**.

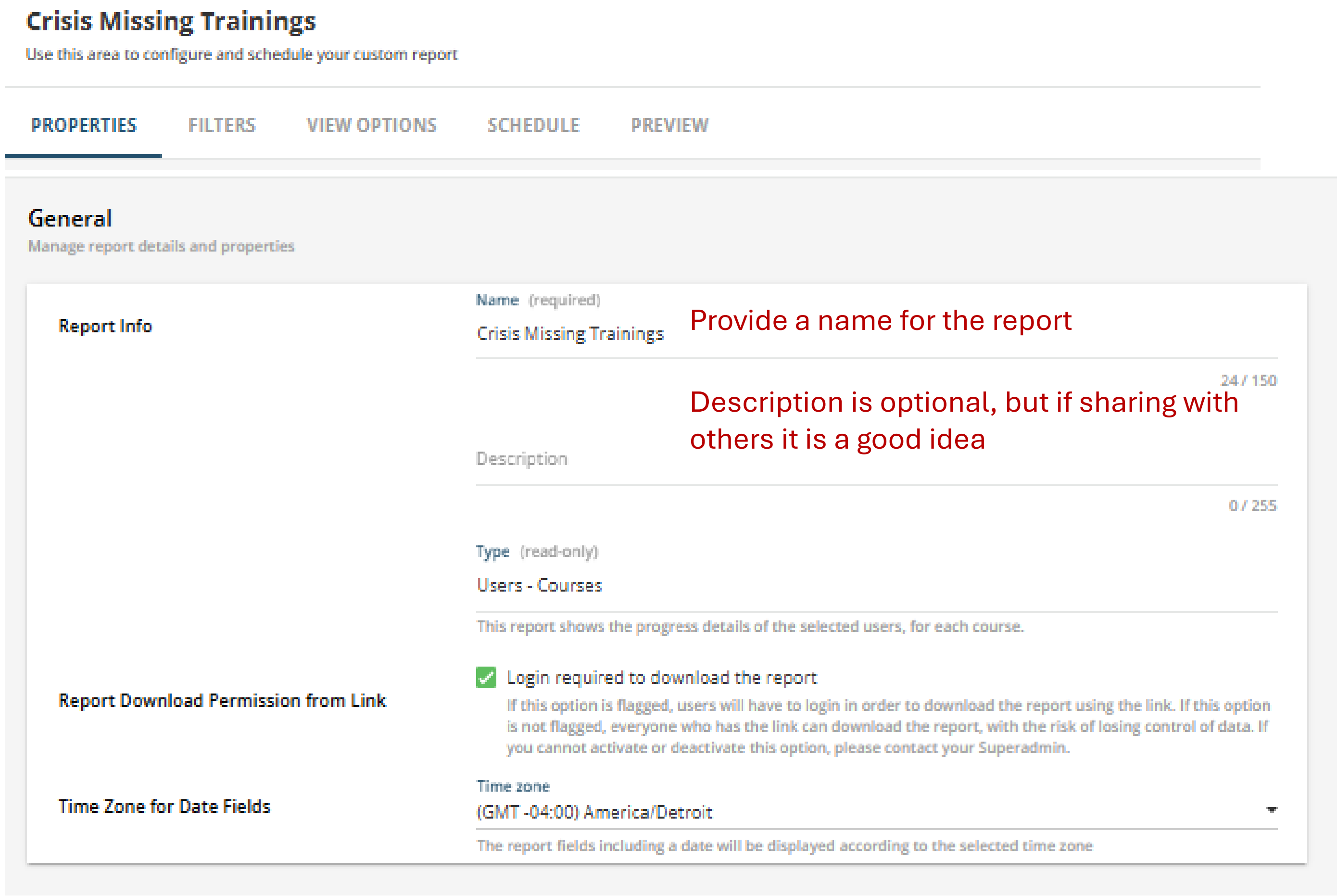
Step 2: Click the plus icon in the top-right corner to open the Create a New Custom Report panel.

Step 3: Switch to the **Custom Reports Builder** tab to view existing reports or start a new one.

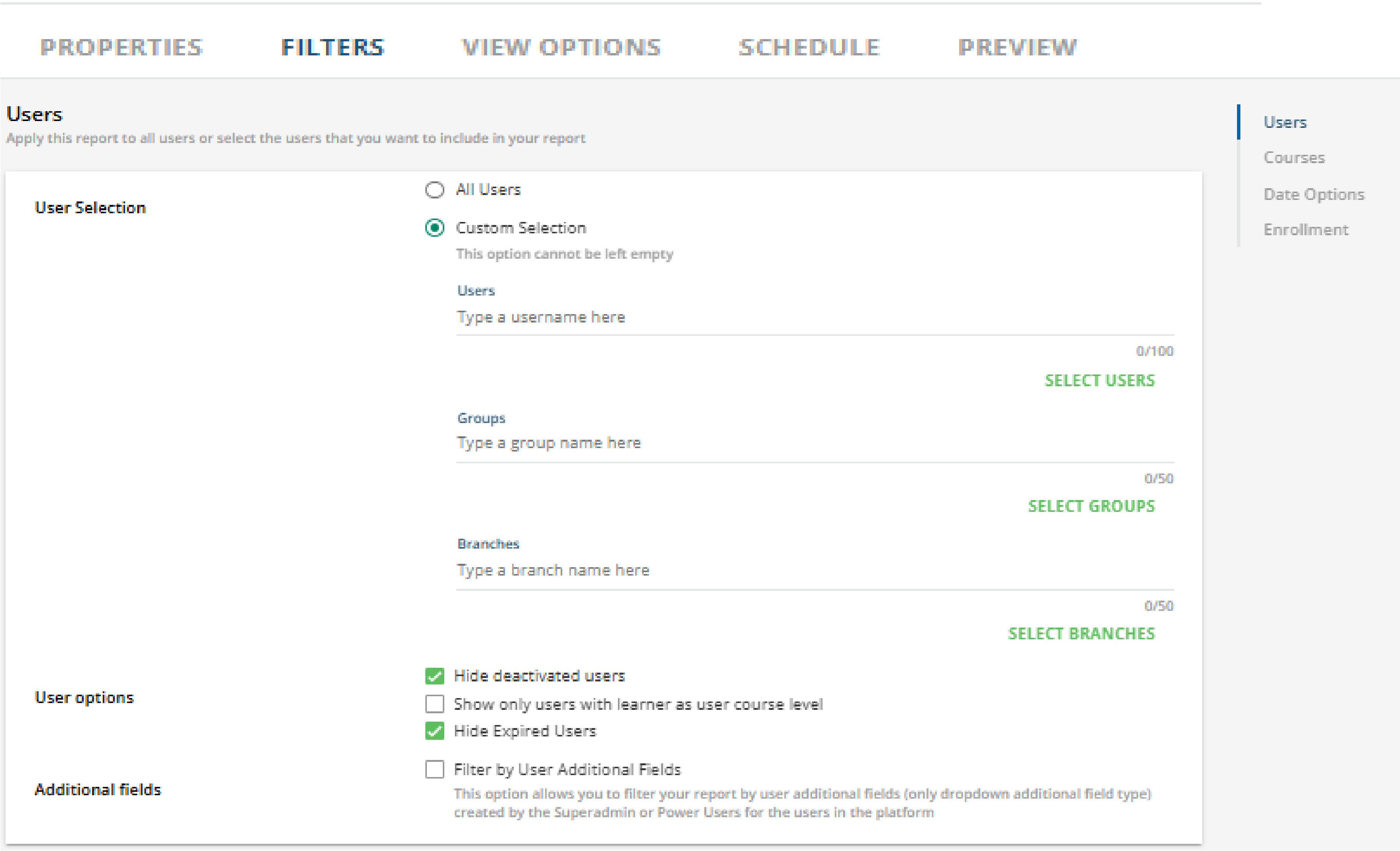




Creating a Custom Report: Properties



Creating Custom Reports – Filters



Creating Custom Reports - Filters

Courses

Apply this report to all courses or select the courses that you want to include in your report

Course Selection

- ( ) All courses
  This option will include present and future courses
- (•) Custom selection
  This option cannot be left empty

Courses

Suicide Prevention 101 ×
Acceptable Technology Use Policy ×
Workplace Violence: Warning Signs & Prevention ×
Sexual Harassment Prevention in the Workplace ×
Infection Prevention and Control ×
Workplace Diversity, Inclusion, & Sensitivity ×

Type a course title here

31/50

SELECT COURSES

Learning plans

Type a learning plan title here

0/100

SELECT LEARNING PLANS

Course type

- (•) All types
- ( ) E-learning
- ( ) ILT

Course Expiration Date

- (•) All Expiration Dates
- ( ) Select Expiration Date
  This option only shows the courses for which an expiration date has been set

Additional Filters

Category

Select a category

SELECT CATEGORY

Course Options

- [x] Hide archived courses
  This option applies only when both the User selection and the Course selection filters are set to All. It has no effect when a custom selection of users or courses is used.

Creating Custom Reports - Filters

Course type

All types

E-learning

ILT

You can choose E-Learning or Instructor Led Trainings (ILT).

Best practice is to choose all types.

Course Expiration Date

All Expiration Dates

Select Expiration Date

This option only shows the courses for which an expiration date has been set

Choose “All Expiration Dates”

Additional Filters

Category

Select a category

SELECT CATEGORY

Course Options

Hide archived courses

This option applies only when both the User selection and the Course selection filters are set to All. It has no effect when a custom selection of users or courses is used.

Be sure to save changes

SAVE CHANGES

Creating Custom Reports – Report Fields

Report Fields

Select the fields that you want to display in your report

User Fields

Select all

Choose the fields you would like to include in your report.

- [x] Username
- [x] Branch Name
- [ ] Branch Path
- [ ] Branches Codes
- [ ] Date Of Birth (Mm/dd)
- [ ] Deactivated
- [ ] Department
- [ ] Drivers License #
- [x] Email
- [ ] Email Validation Status
- [ ] Employee Type
- [ ] Employer
- [x] First Name
- [ ] Full Name
- [ ] Hire/start Date
- [ ] Job Title
- [x] Last Name
- [ ] Learning Plan Type
- [ ] Ochn Employee Id
- [ ] Power User
- [ ] User Creation Date
- [ ] User Expiration Date
- [ ] User Last Access Date
- [ ] User Level
- [ ] User Suspension Date
- [ ] User Unique Id
- [ ] What Service Do You Provide?

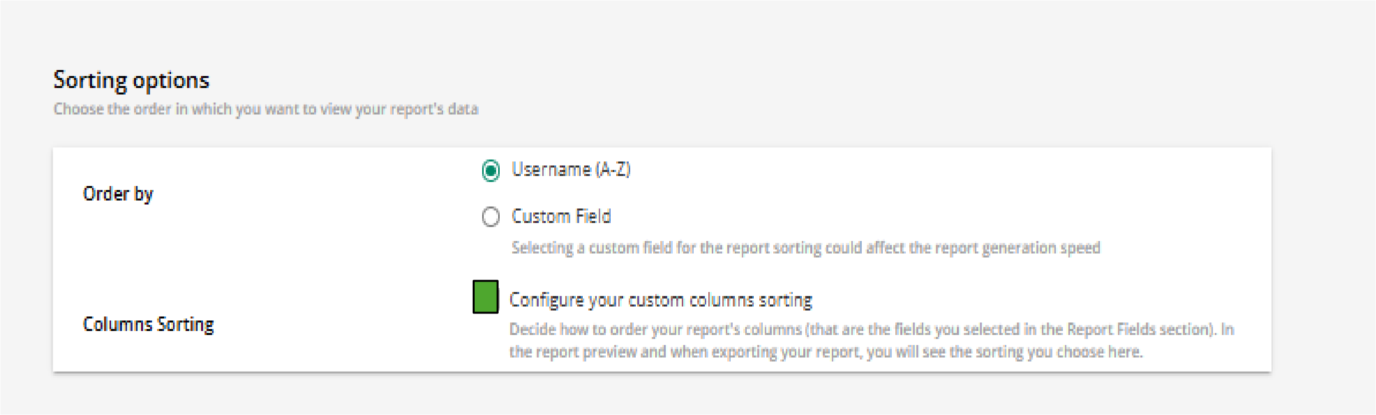
Course Fields

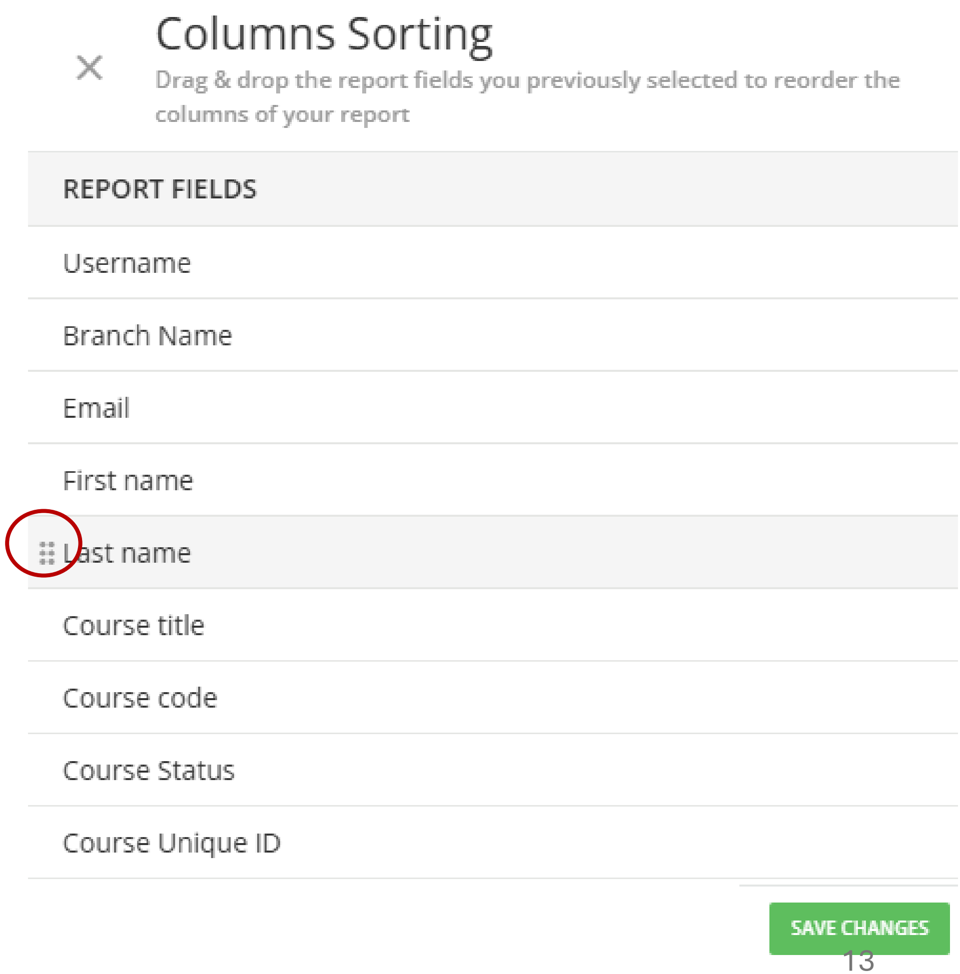
Select all

- [x] Course Title
- [ ] Additional Language Codes
- [ ] Additional Languages
- [ ] Certificate Content
- [ ] Certificates & Approved Ce Hours Description - Relias Library Solution
- [ ] Certificates & Approved Ce Hours Description - Relias Library Solution
- [ ] Course Archived
- [ ] Course Category
- [ ] Course Category Code
- [x] Course Code
- [ ] Course Creation Date
- [ ] Course Duration
- [ ] Course End Date
- [ ] Course Has Expired
- [ ] Course Internal Id
- [ ] Course Start Date
- [x] Course Status
- [ ] Course Type
- [x] Course Unique Id
- [ ] Credits (Ceus)

Creating Custom Reports – Sorting Options

Choose the OPTIONS   for how you would like your report sorted.

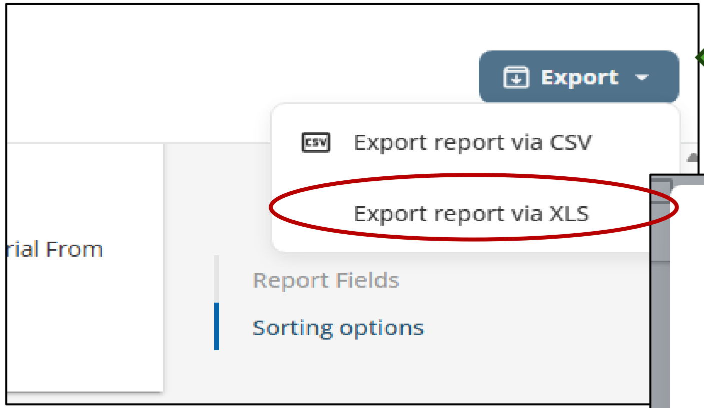


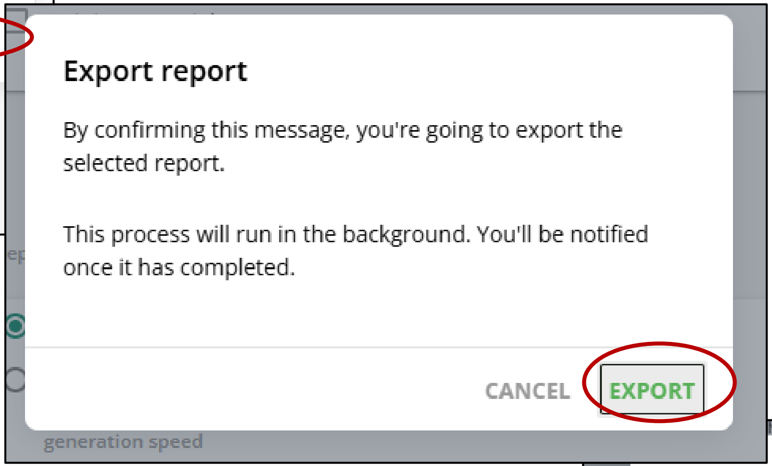


Drag and drop the report fields by highlighting the field you want to move and drag at the left side of the row with the dots.

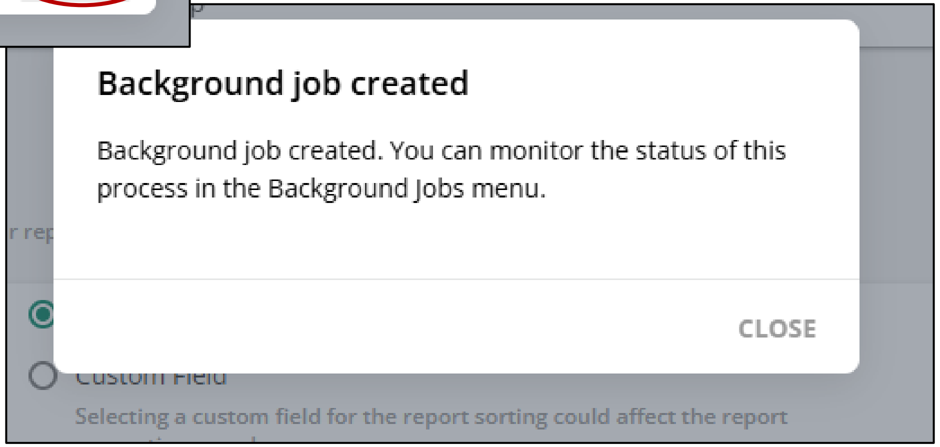
Creating Custom Reports – Exporting the report

1. Click on export via XLS.
2. Choose “Export report via XLS” (Excel).





3. Click the **EXPORT** button.



After the background job is complete. The report will be emailed to you. This sometimes takes several minutes depending on the size of the report.