VERTICLIMB

My Team & Reporting Page: Manager/Supervisor View

Running Compliance Reports

Contents

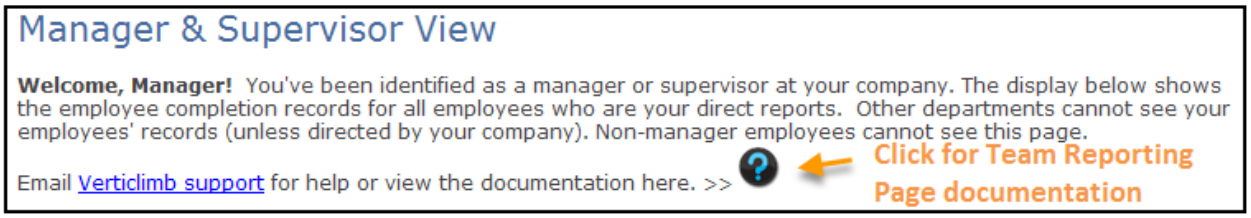
Manager View Button – Page Orientation

You can check training progress by visiting the "Manager & Supervisor View" page.

Click the Manager View button located on the left hand navigation pane. This will take you to the Manager & Supervisor View page.

Documentation Link Icon

Click on the  at the top of the page to open the documentation on how to run reports.



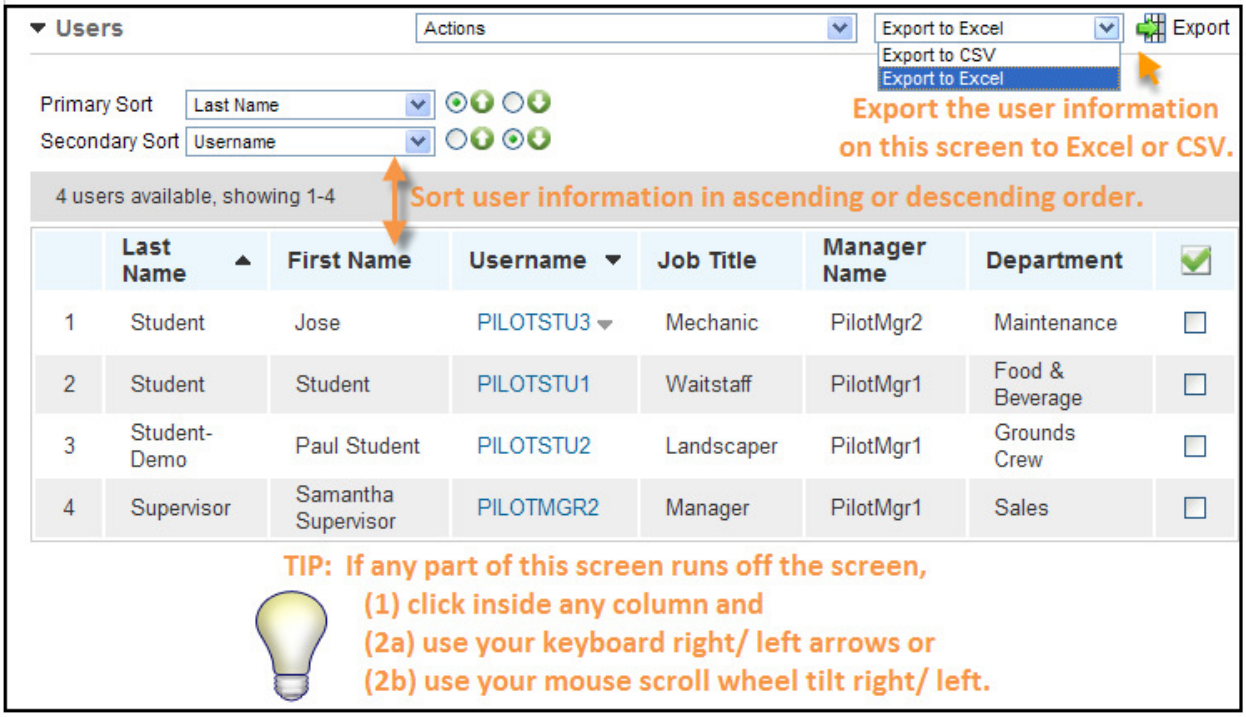
Action Menus

Reports are run from the My Team & Reporting Actions menu.

The Users Action menu provides quick views of user progress.

User Section Orientation

The Users section displays a quick view of user information. The information on this screen can be sorted and exported.

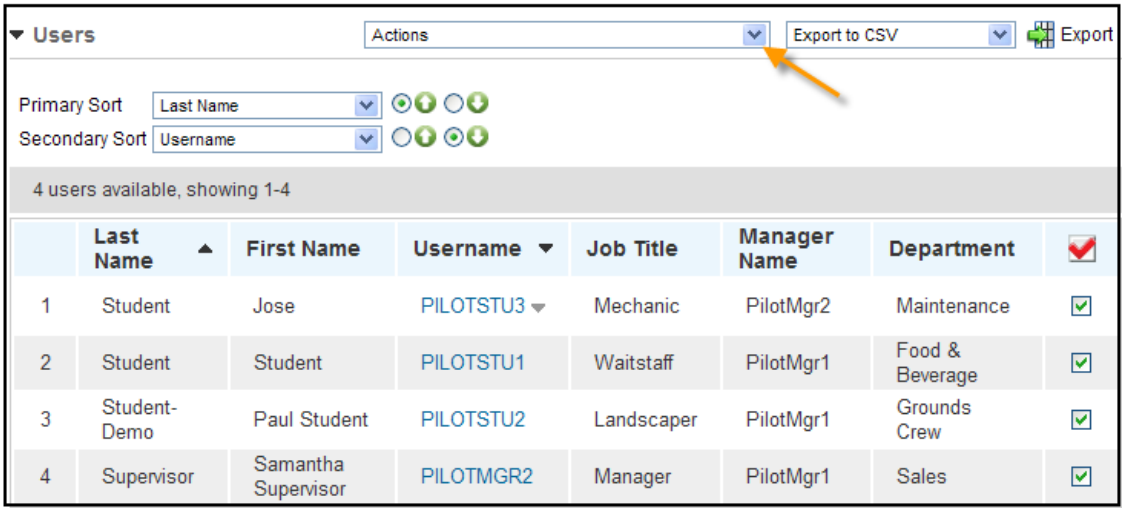


Course Completions – A Snapshot View

You can see a snapshot overview of how your staff is doing by using the **Users Actions** drop-down menu. This view provides a list of course completions for a single person or your entire staff.

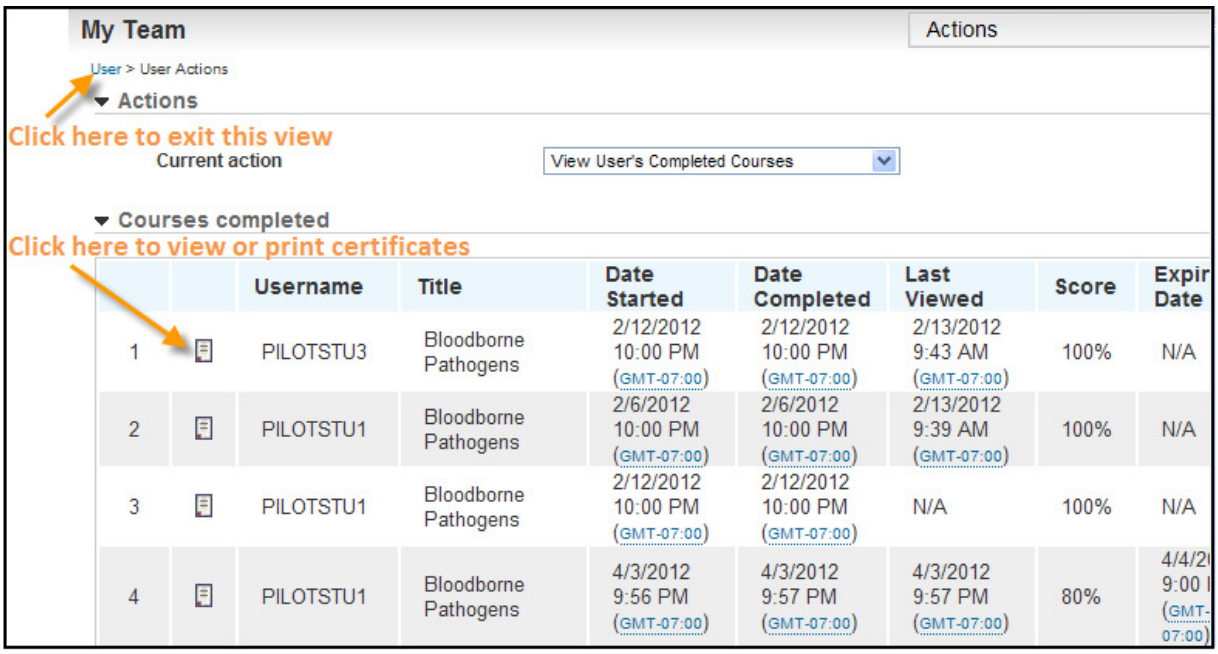
NOTE: If you need to export and download a full report to Excel, see ***Report Builder*** section of this document.

1. Select the person(s) you wish to view by check-marking the box in the far right column of the user's name or click the green checkbox ✔ to select the entire page.
2. Click the drop down arrow in the Users Actions Menu.
3. Select "Courses completed."



	Last Name	First Name	Username	Job Title	Manager Name	Department	
1	Student	Jose	PILOTSTU3	Mechanic	PilotMgr2	Maintenance	☑
2	Student	Student	PILOTSTU1	Waitstaff	PilotMgr1	Food & Beverage	☑
3	Student-Demo	Paul Student	PILOTSTU2	Landscaper	PilotMgr1	Grounds Crew	☑
4	Supervisor	Samantha Supervisor	PILOTMGR2	Manager	PilotMgr1	Sales	☑

The course completions list will populate in the same window.



		Username	Title	Date Started	Date Completed	Last Viewed	Score	Expir Date
1		PILOTSTU3	Bloodborne Pathogens	2/12/2012 10:00 PM (GMT-07:00)	2/12/2012 10:00 PM (GMT-07:00)	2/13/2012 9:43 AM (GMT-07:00)	100%	N/A
2		PILOTSTU1	Bloodborne Pathogens	2/6/2012 10:00 PM (GMT-07:00)	2/6/2012 10:00 PM (GMT-07:00)	2/13/2012 9:39 AM (GMT-07:00)	100%	N/A
3		PILOTSTU1	Bloodborne Pathogens	2/12/2012 10:00 PM (GMT-07:00)	2/12/2012 10:00 PM (GMT-07:00)	N/A	100%	N/A
4		PILOTSTU1	Bloodborne Pathogens	4/3/2012 9:56 PM (GMT-07:00)	4/3/2012 9:57 PM (GMT-07:00)	4/3/2012 9:57 PM (GMT-07:00)	80%	4/4/2 9:00 (GMT-07:00)

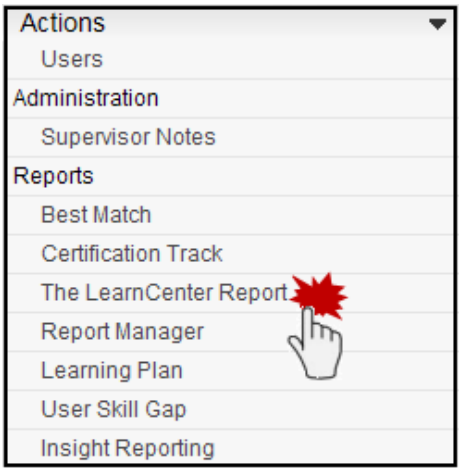
Report Builder – A Detailed View

To build a report that you can download to an Excel or a CSV (comma separated value) format, use the **Team Reporting Actions** drop-down menu. The LearnCenter Report is most commonly used.

The LearnCenter Report

The LearnCenter Report is the most flexible report and is often used for reporting on all types of training items.

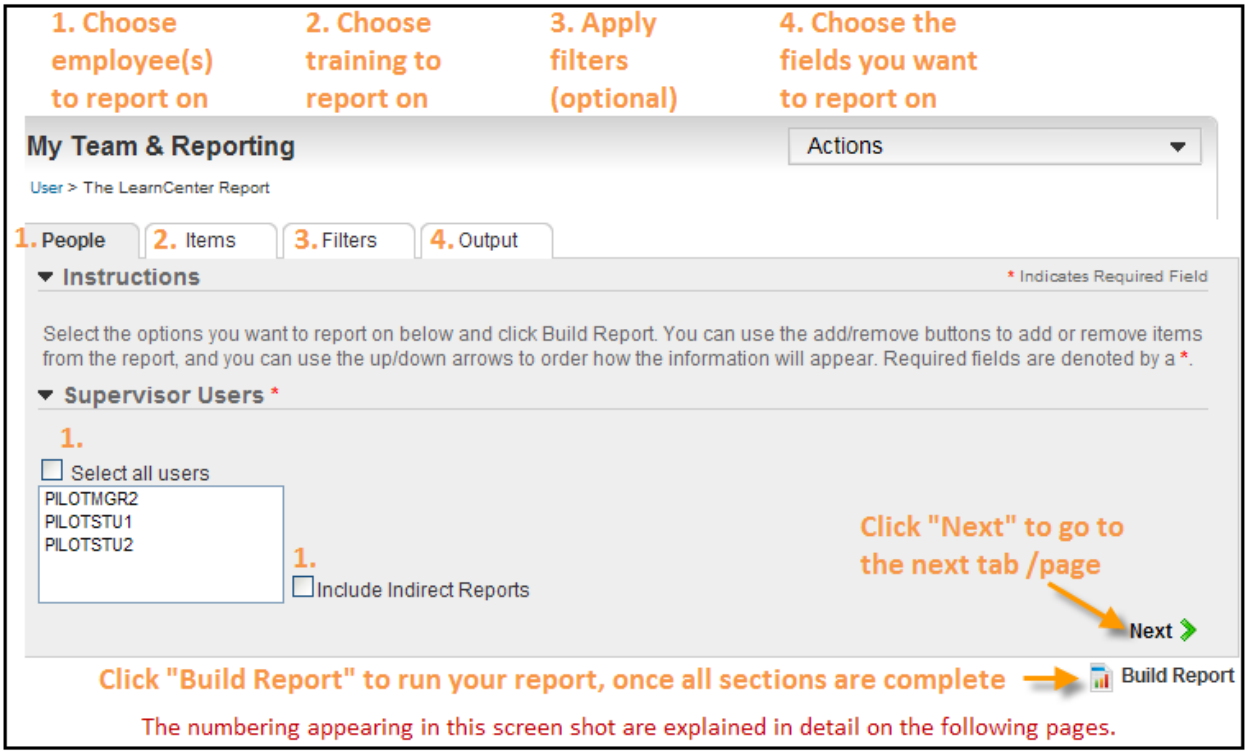
1. Click the Team Reporting Actions menu drop-down arrow.
2. Choose *The LearnCenter Report* from the list.
3. The Report Builder interface will appear.



Good news…. You only need to build it once!
Just set the report options the way you like them and build your report the first time. When you need to run the same report again, go to the Report Manager interface and click the "run report now" button.

The LearnCenter Report – Page View Orientation

Here is a screenshot of The LearnCenter Report interface. The numbered steps show what you need to choose to build a report.



1. Select People for the report

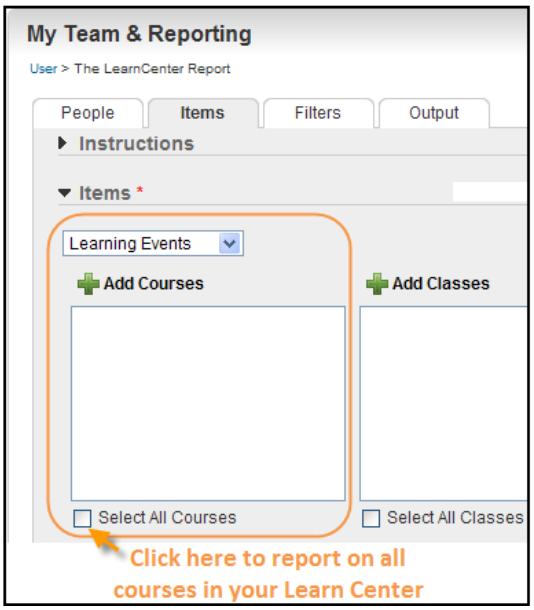
- **To see all of your direct reports,** checkmark "Select All Users."
- **To see all of your direct and indirect reports,** checkmark "Include Indirect Reports" and then checkmark "Select All Users."
- **To see individual users,** click on a specific username from the list in the box.

2. *Select Items for the report – Courses (Recurring & Non-Recurring)*

Click "Add Courses" or "Select All Courses" to report all courses ever completed or started, regardless of Learning Plan or Skill assignment.

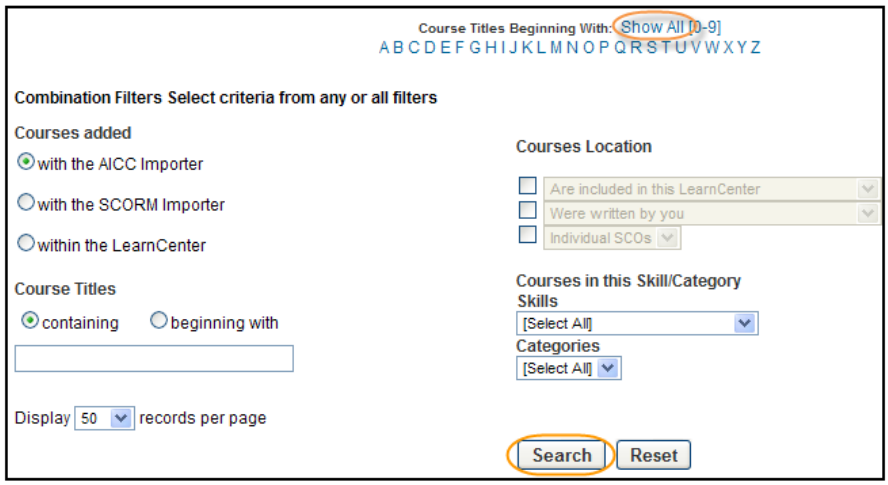
To report on all courses, click "Select All Courses." 

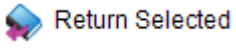
- This option does not return courses with a Not Attempted (i.e., never started) status.



To report on specific courses, click "Add Courses." 

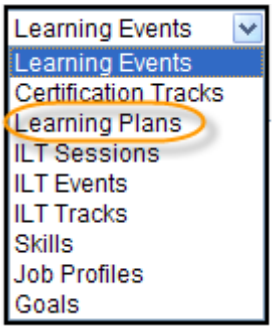
- You will be taken to the Filters display.
- Select Show All or search by course title name..
- Click "Search."

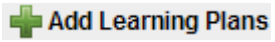
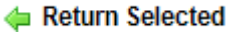


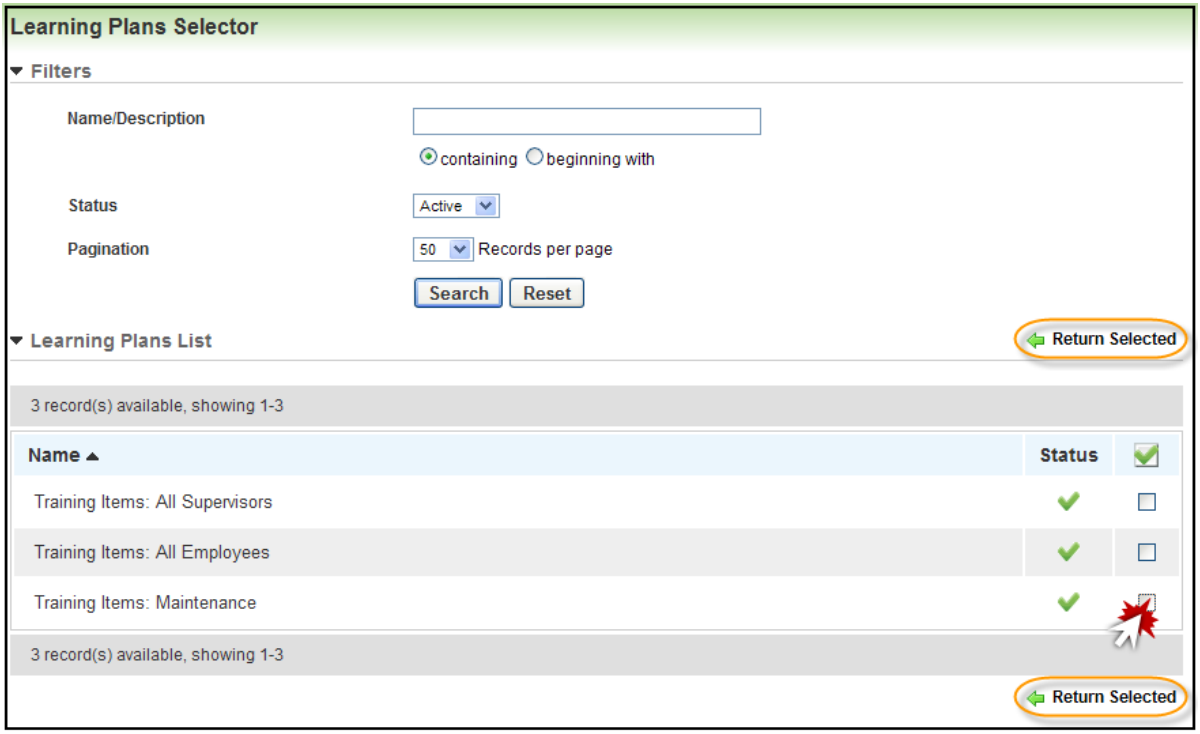
- Check the boxes next to the course names displayed in your search return.
- Click "Return Selected"  to add them to your report.

3. Select Items for the report – Learning Plans (Non-Recurring Courses)

To report on Learning Plans, select Learning Plans from the Learning Events drop-down menu.



- Click "Add Learning Plans." 
- The Learning Plans Selector will open.
- Check the boxes next to the Learning Plan names to select individual plans or select all by clicking the green checkmark  .
- Click "Return Selected"  to add the Learning Plan(s) to your report.

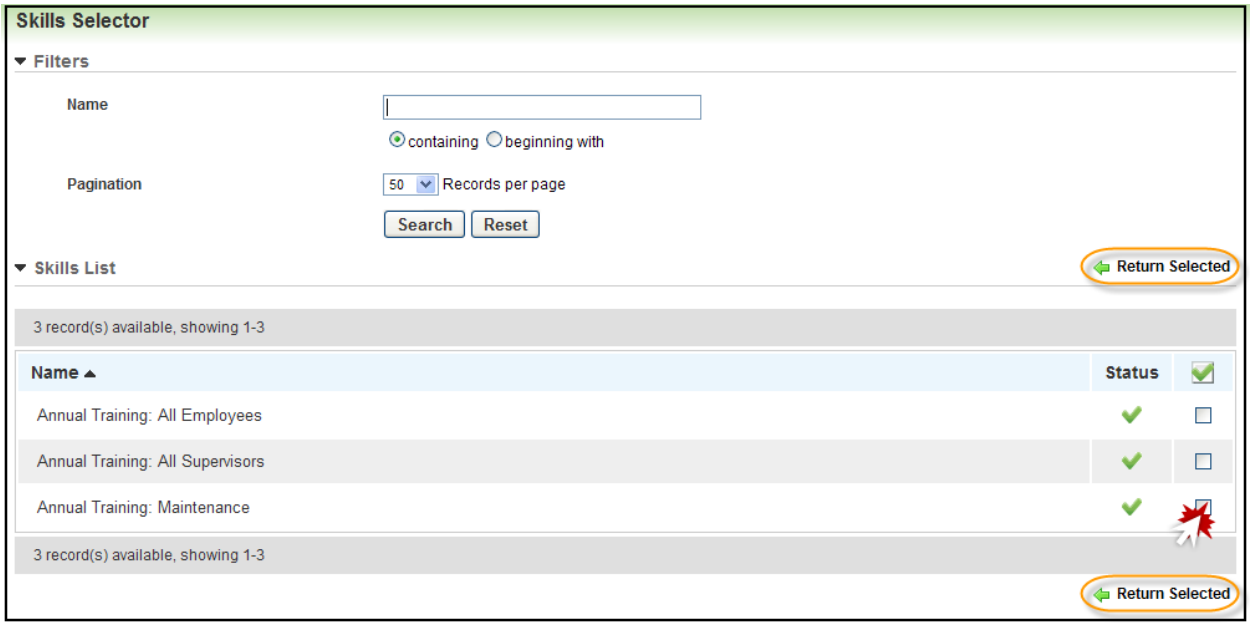


 Use the Learning Plans report method to see employees who have a status of Not Attempted (i.e., they have not clicked on a course to start it).

4. Selecting Items for the report – Skills (Recurring Courses)

To report on Skills (if you have recurring training set up)—

- Select Skills form the Learning Events drop-down menu.
- Click "Add Skills." Add Skills.
- You will be taken to the Skills Selector.
- Check the boxes next to the Skill names you want.
- Or select all Skills by clicking the green checkmark in the Status column.
- Click "Return Selected" Return Selected to add the Skill(s) to your report.

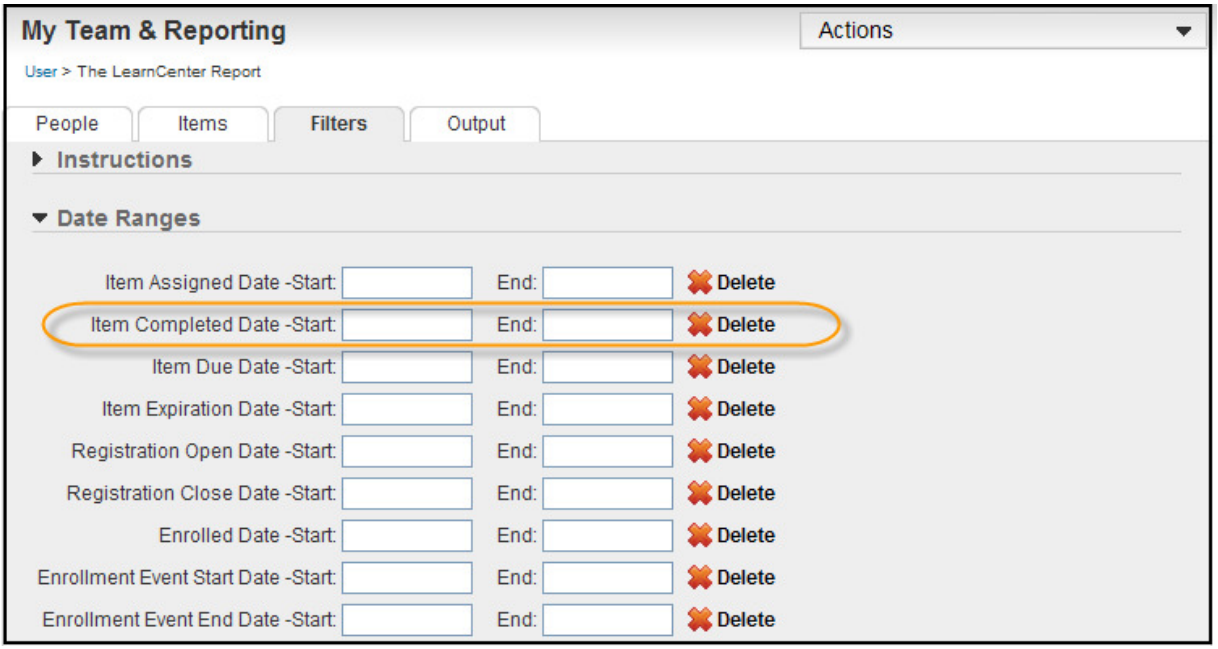


The Skills learning event will give you a report on the status of all users that are assigned to courses for the purpose of retraining.

5. Select Filters for the report (optional)

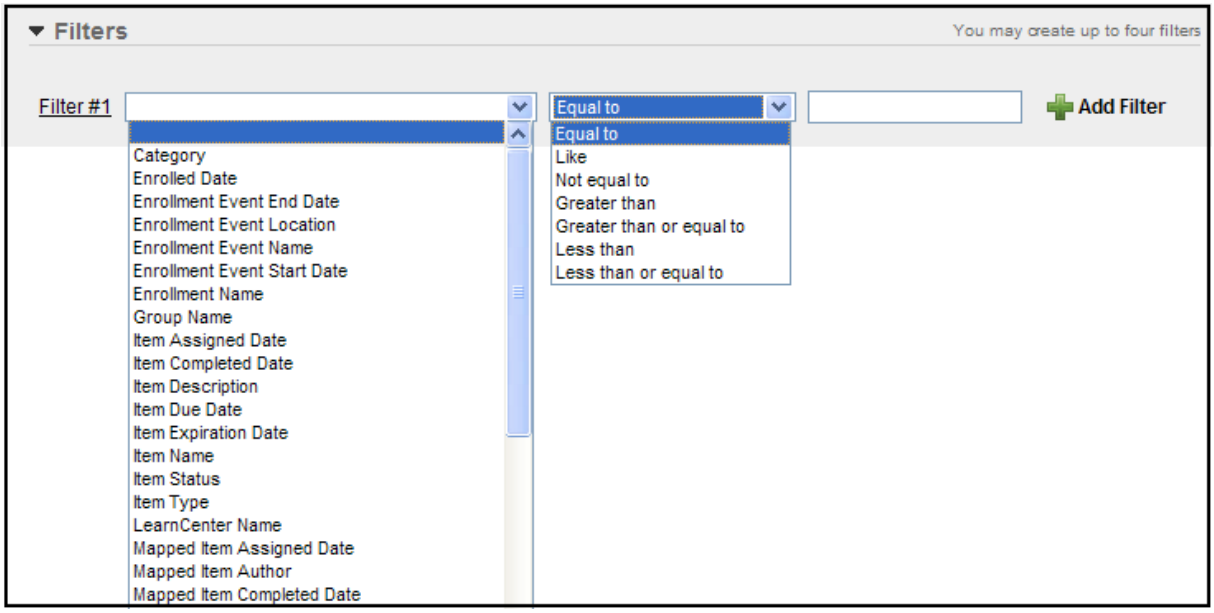
Optional Step – Date Ranges

Date range is useful for reporting on a specific date range for course completions.



Optional Step – Filters

Filters are useful for reporting on Item Name, Department Name, Manager Name, Job Title, Due Dates.... A maximum of four filters can be added to a report.



Optional Step – Status

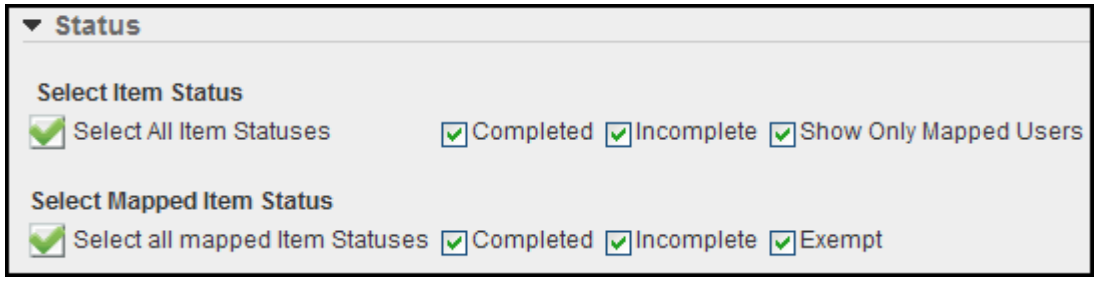
Select Item Status

- ***Select All Item Statuses*** checkmarks all item statuses for reporting.
- ***Completed*** shows all people who have completed a course.
  If you uncheck this box, it will not report on the complete courses.
- ***Incomplete*** shows all people who have an item status of incomplete.
  If you uncheck this box, it will not report the incomplete courses.
- ***Exempt*** shows all people who have been manually exempted from the course.
  If you uncheck this box it will not report any person who has been marked as exempt from a course.
- ***Show Only Mapped Users*** reports only the items (or courses) assigned to the person. If you uncheck this box it will show every course in your Learn Center, whether people are assigned to them or not.

Select Mapped Item Status

This option is active when using the Learning Plans or Skills learning event.
"Mapped Item" represents the individual course. "Item" represents the Learning Plan name or Skill name.

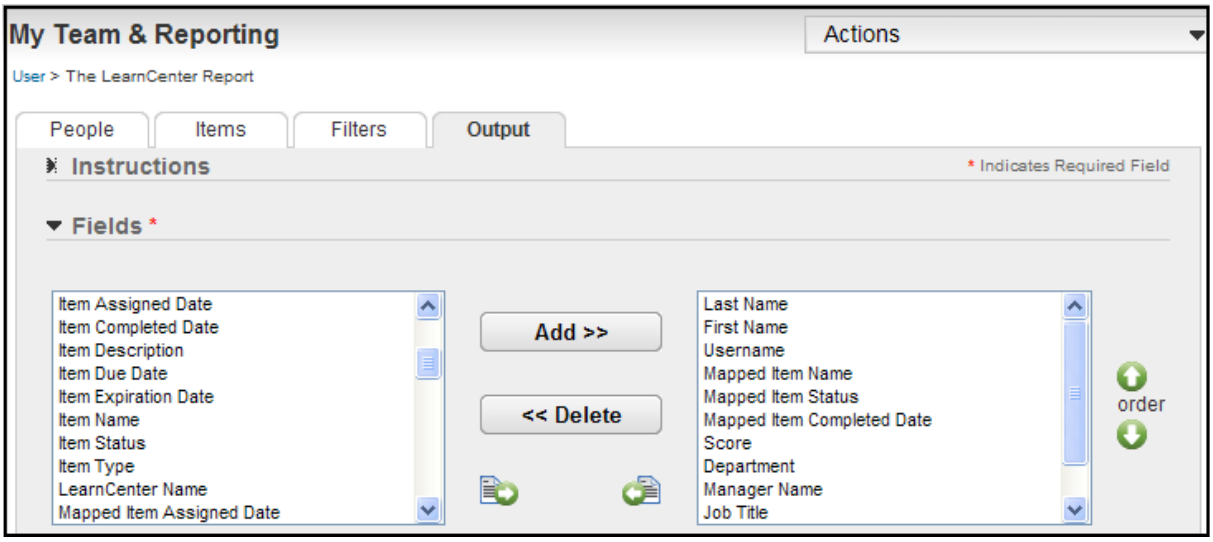
- ***Select all mapped Item Statuses*** checkmarks all mapped item statuses for reporting.
- ***Completed*** shows all people who have completed a course.
  If you uncheck this box, it will not report on the complete courses.
- ***Incomplete*** shows all people who have an item status of incomplete.
  If you uncheck this box, it will not report the incomplete courses.
- ***Exempt*** shows all people who have been manually exempted from a course.
  If you uncheck this box it will not report any person who has been marked as exempt from a course.



NOTE: You must check "Show Only Mapped Users" when running Learning Plans or Skills reports. This option displays results for "Not Attempted" status courses.

6. Select Output information fields and file delivery for the report

- Select the fields you want to include in the report from the list on the left. Recommended reporting fields are listed on the following page.
- Add and remove the fields you need: Add >> << Delete
- Reorder the report fields from the list on the right by clicking the up/down arrows.



Use the **Results Sort Order** method to reorder the fields when you intend to rerun the report build for future use.

Recommended reporting fields—Add Courses or All Courses

When using the"Add Courses" or "Select All Courses" report option, the recommended fields are:

- Course Content Time Spent *(displays amount of time student spent taking the course)*
- Item Completed Date *(refers to the completion date the course)*
- Item Name *(refers to the name of the course)*
- Item Status *(refers to the status of the course)*
- Score
- Username
- First Name
- Last Name
- Email
- Job Title
- Department
- Manager Name

Recommended reporting fields—Learning Plans or Skills

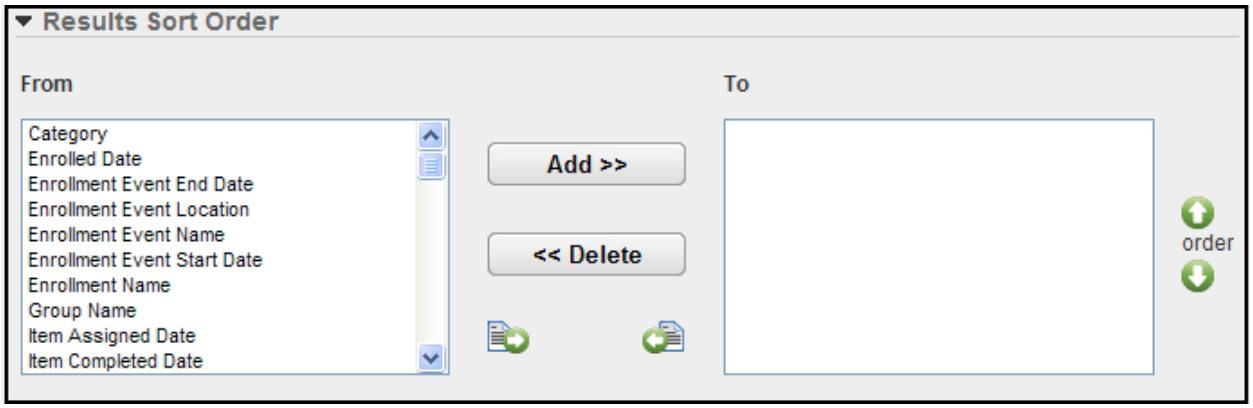
When using the "Learning Plans" or "Skills" learning event option, the recommended fields are:

- Item Completed Date *(refers to the completion date the Learning Plan or Skill)*
- Item Name *(refers to the name of the Learning Plan or Skill)*
- Item Status *(refers to the status of the overall Learning Plan or Skill)*
- Mapped Item Completed *(refers to the completion date the course)*
- Mapped Item Name *(refers to the name of the course)*
- Mapped Item Status *(refers to the status of the course)*
- Score
- Username
- First Name
- Last Name
- Email
- Job Title
- Department
- Manager Name

Results Sort Order (use with reports you will save and rerun)

If you are going to build a report that you will rerun on a regular basis, use the Results Sort Order section to order the fields you wish to see in your reports.

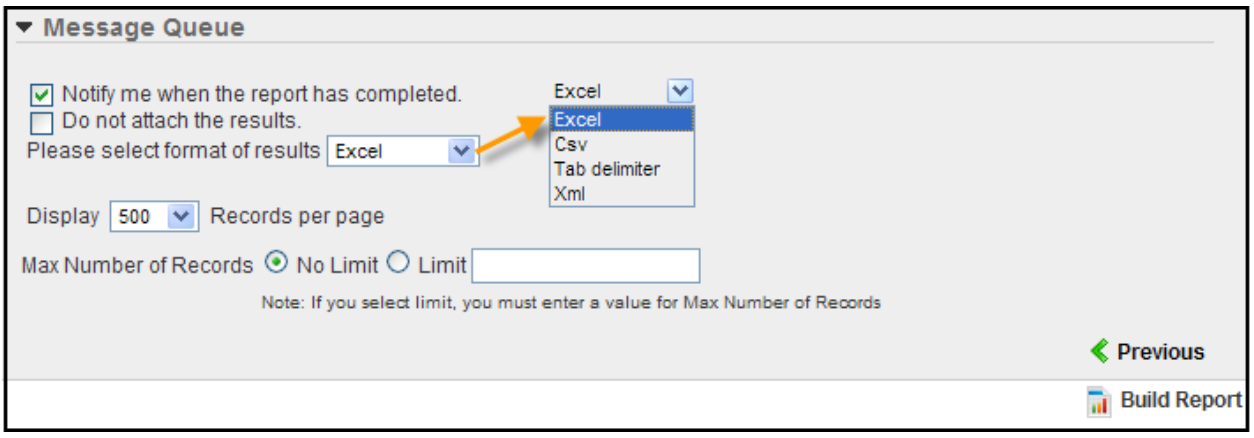
- It is not necessary for the fields to match the "Fields" section choices above. You can add more fields in this section which can be used in case you add or remove fields from the "Fields" sectionwhen you run future reports.
- By ordering the sort results here, you will guarantee that your "Field" outputs will appear in the order you have chosen.



Message Queue Options

Check "Notify me when the report has completed" to receive an email in your Learn Center system Inbox with the report results attached. If you supplied an email during roll-on, you will also receive a duplicate email at that address.

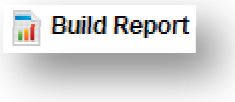
Check "Do not attach the results" if you do not want the report notification email to contain your file. You would need to view the file from the Report Manager display.



If you select "Notify me when the results have completed" option, the report will NOT appear onscreen. You will be taken to the ***Report Manager*** display and you will receive an email.

Build Reports button

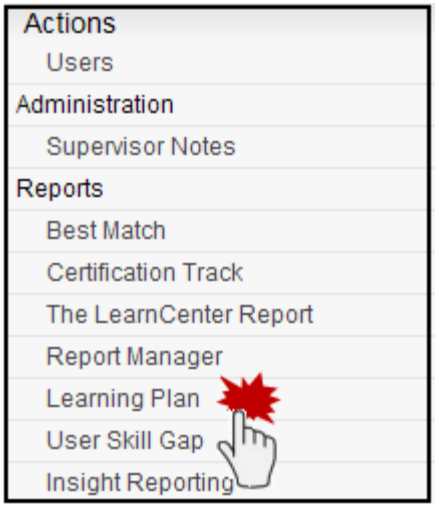
Click the Build reports button to activate the report.

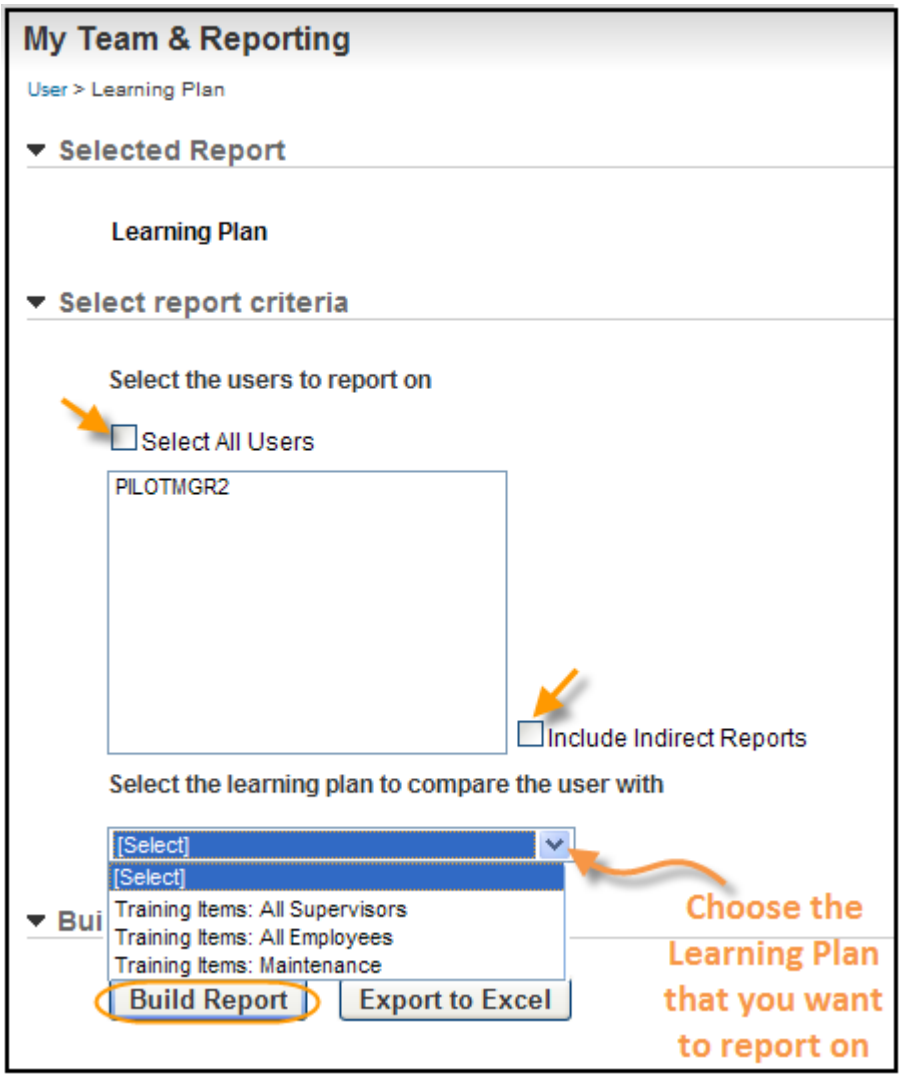


If you missed any required fields, the system will display an error message in red text detailing what you need to correct in order to run the report.

Team Reporting Actions Menu – Learning Plan

1. Click on the Team Reporting Actions menu drop-down arrow.
2. Choose "Learning Plan."
3. The Report Builder interface options appear.
4. Choose options to build your report using the same techniques you used to build The LearnCenter Report.



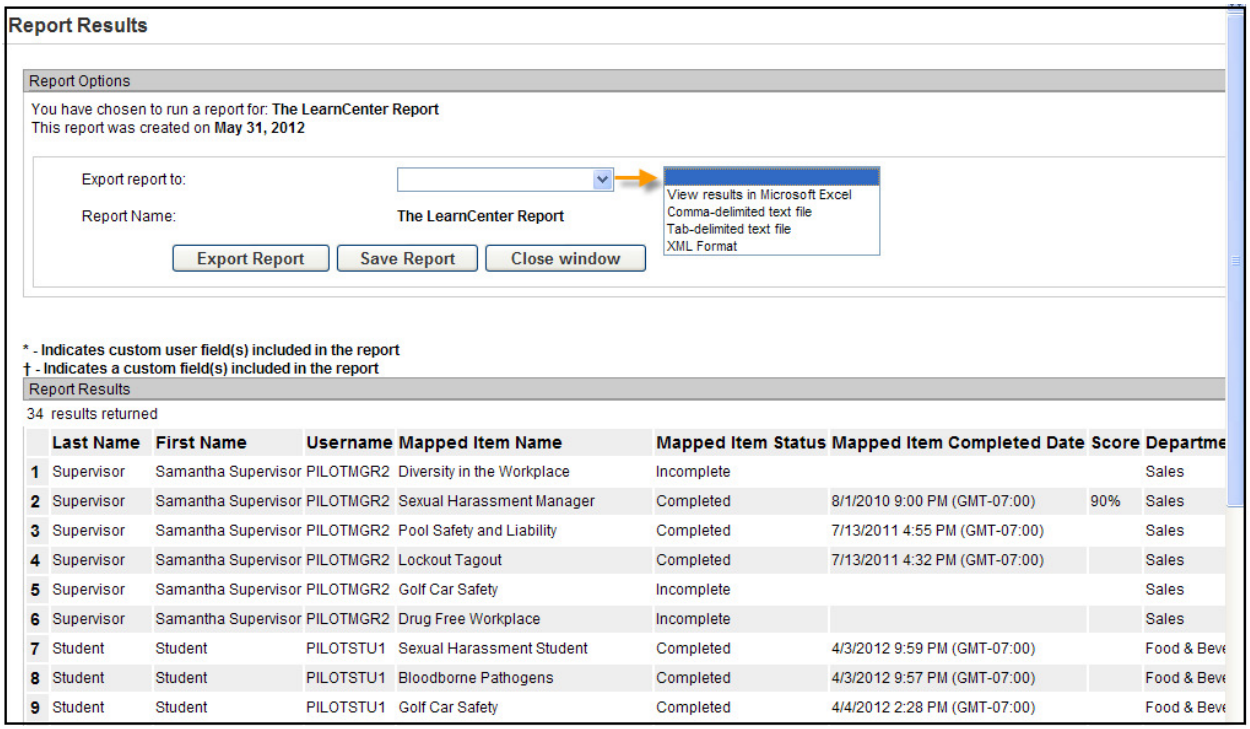


Options you will encounter in the Learning Plan report build

- To see all of your direct reports, checkmark "Select All Users."
- To see all of your direct and indirect reports, checkmark "Include Indirect Reports" then checkmark "Select All Users."
- From the drop-down menu, select the Learning Plan you want in the report.
- Click "Build Report" and page down to see the results.
- Click "Export to Excel" to open or save the report as an Excel spreadsheet.

Exporting Reports

1. Click the drop down menu and select "View results in Microsoft Excel."
2. Click "Export Report" and choose a location to save the file.
   - Reports can be opened or exported (saved) as several file types:
     - **Excel**
     - **CSV** *(comma separated value; data file with column data separated by commas)*
     - **Tab-delimited text** *(date file with column data separated by tabs)*
     - **XML format** *(data file marked up inside xml tags)*
3. Once saved to your computer, you may open it. If you chose the Excel format, open the file and then chose File > Save As… and save your Excel file as type "Excel Workbook".



	Last Name	First Name	Username	Mapped Item Name	Mapped Item Status	Mapped Item Completed Date	Score	Departme
1	Supervisor	Samantha Supervisor	PILOTMGR2	Diversity in the Workplace	Incomplete			Sales
2	Supervisor	Samantha Supervisor	PILOTMGR2	Sexual Harassment Manager	Completed	8/1/2010 9:00 PM (GMT-07:00)	90%	Sales
3	Supervisor	Samantha Supervisor	PILOTMGR2	Pool Safety and Liability	Completed	7/13/2011 4:55 PM (GMT-07:00)		Sales
4	Supervisor	Samantha Supervisor	PILOTMGR2	Lockout Tagout	Completed	7/13/2011 4:32 PM (GMT-07:00)		Sales
5	Supervisor	Samantha Supervisor	PILOTMGR2	Golf Car Safety	Incomplete			Sales
6	Supervisor	Samantha Supervisor	PILOTMGR2	Drug Free Workplace	Incomplete			Sales
7	Student	Student	PILOTSTU1	Sexual Harassment Student	Completed	4/3/2012 9:59 PM (GMT-07:00)		Food & Beve
8	Student	Student	PILOTSTU1	Bloodborne Pathogens	Completed	4/3/2012 9:57 PM (GMT-07:00)		Food & Beve
9	Student	Student	PILOTSTU1	Golf Car Safety	Completed	4/4/2012 2:28 PM (GMT-07:00)		Food & Beve

Report Manager

The Report Manager appears in the Team Reporting Actions Menu. After you build and run a report, your report will automatically appear in the Report Manager display. A report can be in one of three statuses.

Icon	What is the status…
	The scrolling arrow indicates the information for the report is being collected.
	The checkmark indicates the report is complete and available for viewing.
	The disk indicates that the report is saved.

You only need to build a report or reports that you use often, run them, and then they will save to the Report Manager display. Next time you need to rerun a report:

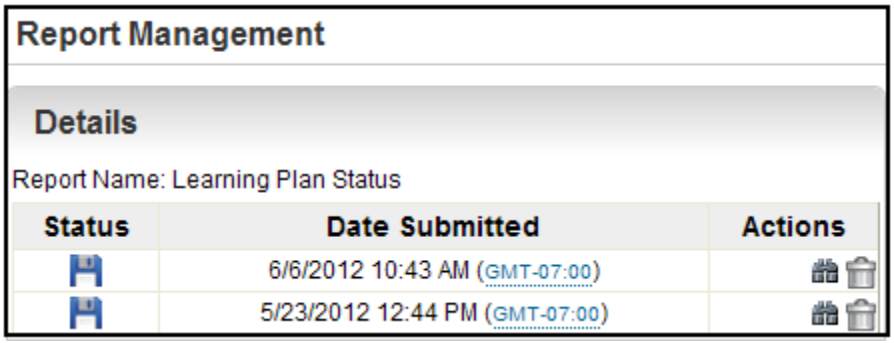
1. Click Report Manager
2. Find your report in the list and move the mouse to be on the line with the name of the report
3. Choose what you'd like to do with your report.

Rerun a report

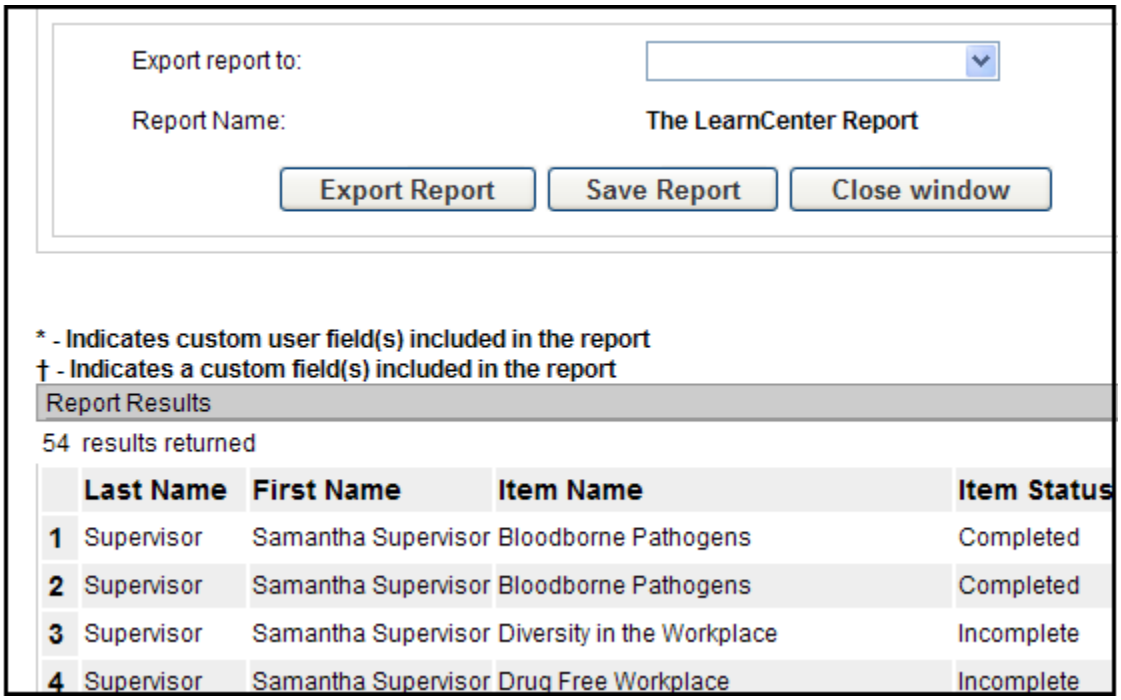
To rerun a report, click on the green circle with the arrow icon  .

Viewing Reports

- To view a report click on the binoculars icon .
- If the report has been saved and run more than once, you will see multiple dates listed, like the screen shot below.



- Find the report date you want to view and click on the binoculars icon .
- The report will display on screen.
- Click "Save Report" to save it.
- Click "Export Report" to download it.



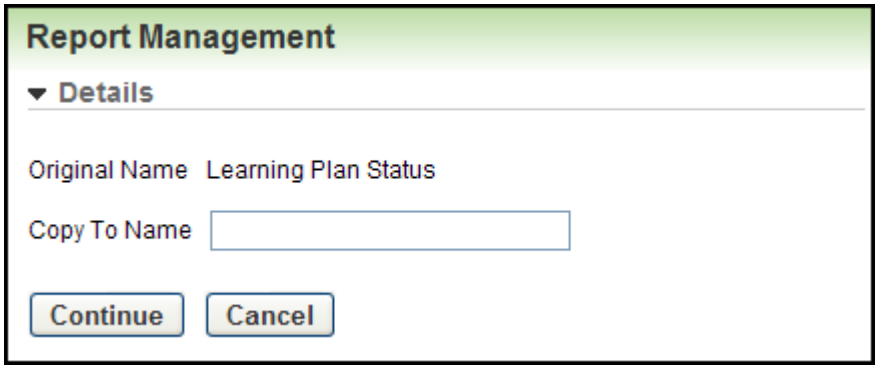
Editing Reports Criteria

- Click on the pencil icon .
- This will open The LearnCenter Report.
    - To see all of your direct and indirect reports, (1) check "Include Indirect Reports" and (2) check "Select All Users."
- Select any other changes to the report.
- Select "Build Report" when you are done making changes.

When users are added or deactivated saved reports will need to be modified to update the users included in the report.

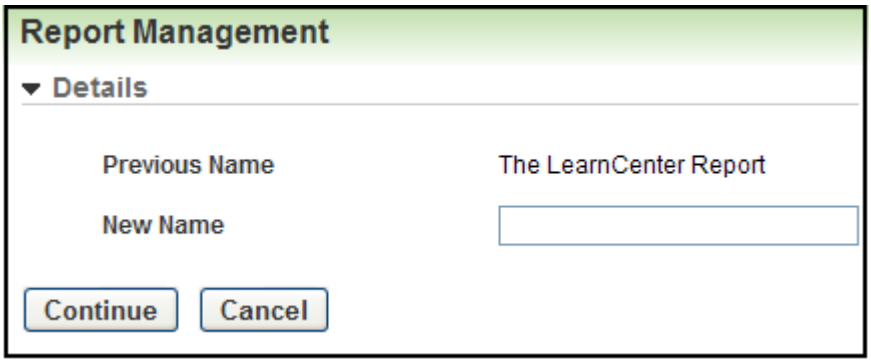
Copying Reports

- Click on the paper icon .
- Type in a name for the copied report in the box.
- Click "Continue."
- The copied report will display in the list of reports on the Report Manager page.



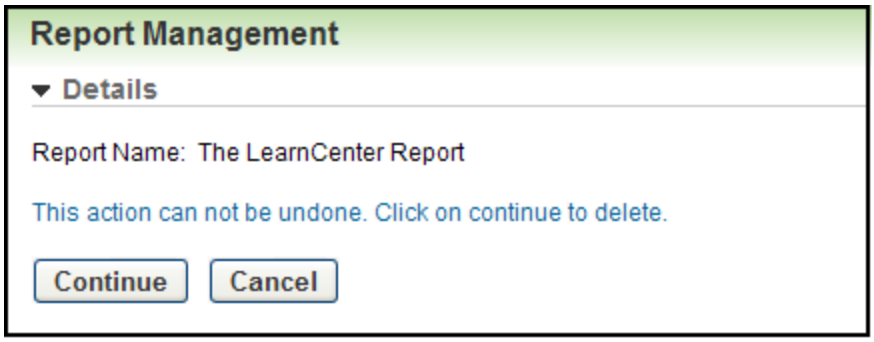
Rename Reports

- Click on the green arrow icon .
- Type in a new name for the report in the box.
- Click "Continue."
- The report will display in the list of reports on the Report Manager page with the new name.



Deleting Reports

- Click on the red x icon .
- A screen will display confirming that the report will be deleted permanently.
- Click "Continue."



Help – Contact Support

Normal hours of operation:

Monday – Friday, 9:00AM to 5:00PM CST
Closed on major holidays

Please feel free to email us with a support question as we may be able to assist you during off hours.

Email: support@verticlimb.com

Toll free: 1.877.814.4254