Selecting and Using Reports

TRACCESS CI makes a wide range of reports readily available. You can run reports on demand or you can schedule reports to run automatically at specified intervals. You can also share reports via email with others.

This Guide reviews the key functions you perform to prepare TRACCESS CI reports:

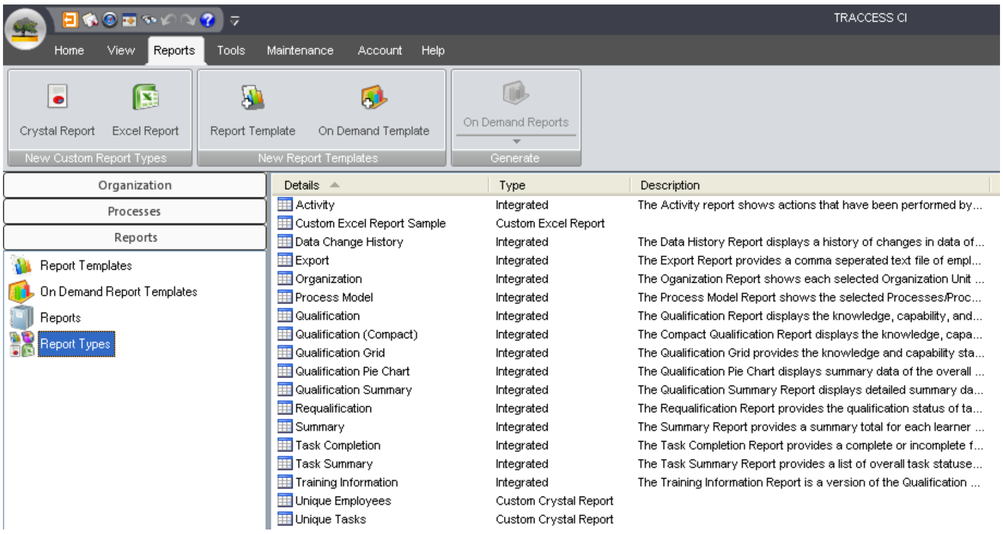
- Choose a report type
- Define report template criteria and filters
- Generate the report
- View the report
- Export the report

Choose a Report Type

The reports you can access and what you can report on depends on your role and where you are assigned in the system. If you have multiple roles, you will have access to all the report types for each role.

Supervisors can run reports about the learning status and progress of team members. Learners can run a Self Qualification report listing the status of all learning assigned in their current job and a Lifetime report listing all learning they have completed in the organization.

Depending on your role, your Reports manager may look like this sample.

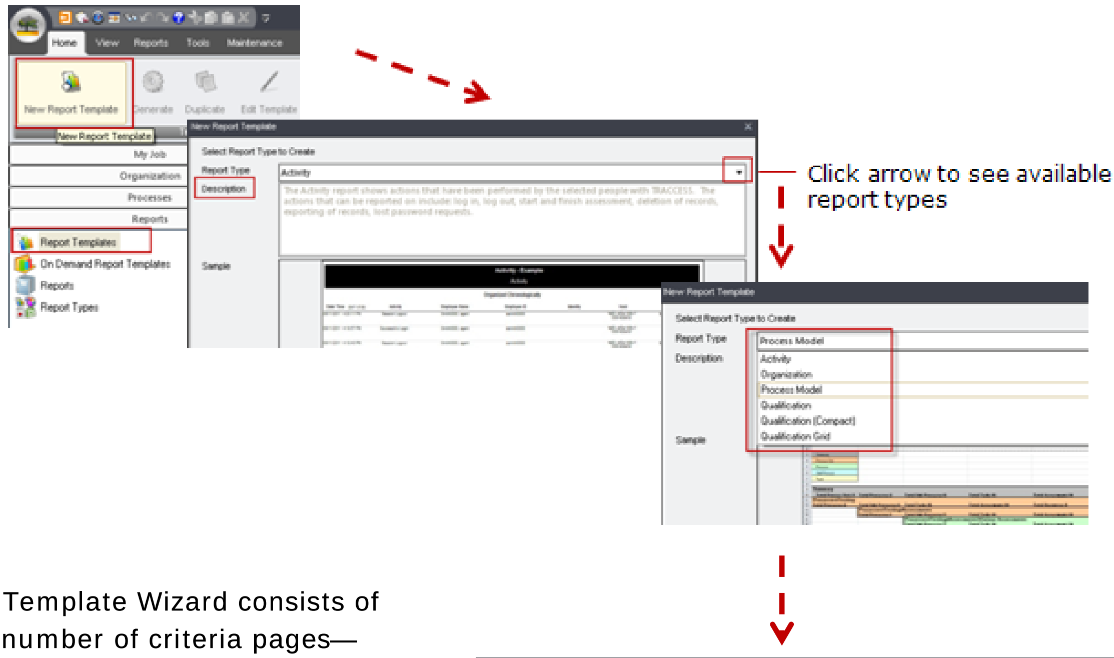


TRACCESS includes numerous report types. Your organization may have added customized reports, which function in the same way. Most employees only need or use a few of the report types. If you need other types, contact your System Owner or Operational Administrator.

The first step in running a report is creating a report template. For any report type, you can have several report templates. For example, you might run a full Qualification Report for all team members on all Tasks, or modify the template to run a report that separates Employees from Contractors, or choose a third version that focuses on critical Tasks.

To create a new report template:

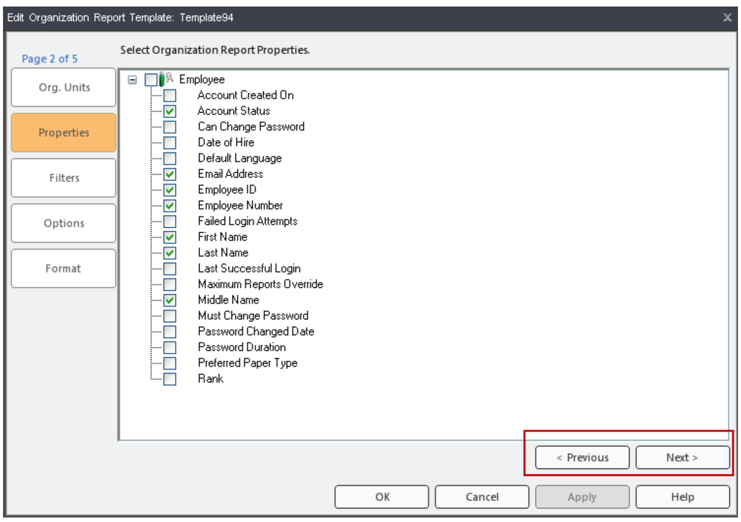
1. Click **Report Templates** in the Reports manager then click the **New Report Template** button in the Ribbon.
2. In the dialog box that opens, click the arrow on the Report Type dropdown menu to view the available report templates. When a Report Type is selected, a dialog box opens showing a description and sample image of the report type.
3. Click **OK** to continue. A Template Wizard will open for the selected Report Type.



A Template Wizard consists of a number of criteria pages—the number of pages and options within those pages vary among different report types.

The criteria page names are listed on the left, and the options for each page is on the right.

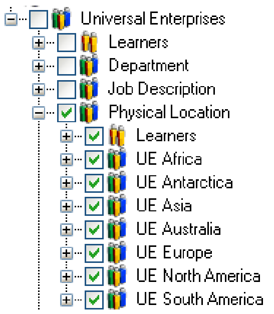
To complete the template, you can select click on the criteria buttons on the left or move through each page using the **Previous / Next** buttons.

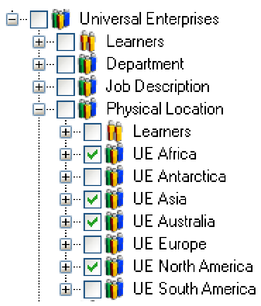


Define Report Template Criteria and Filters

The Template Wizard will guide you through the process of setting criteria and filters for your report. These selections help you tailor your reports to your information needs.

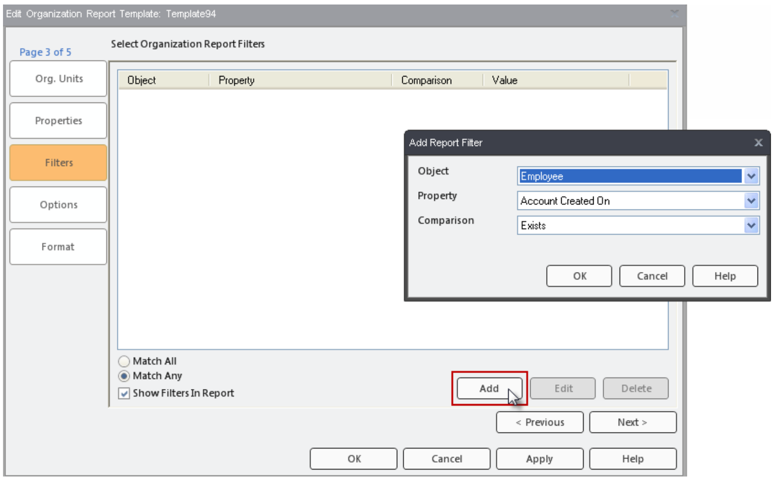
Criteria you select are applied each time you run a report. Keep your criteria as broad as possible so future reports automatically include changes to Sub Processes and Tasks. For example, if you select a higher node in the tree, that selection will automatically apply to everything below as in the image on the left. However, if you individually select each of the items below that node, as in the image on the right, TRACCESS will remember these as explicit selections.





While these two examples look similar, when the company adds a new geographic area to the Physical Location information, the new area will be automatically included in the output from the first template, but not from the second.

You may choose to add a filter to limit report information. A dialog box appears that guides you through the object, property, and comparison filter criteria.



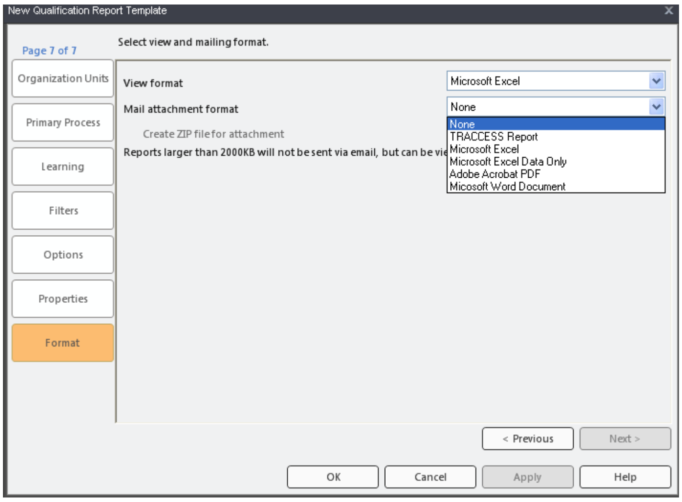
After you add filters, you can select whether TRACCESS should consider the filters separately or together.

- If **Match All** is selected, TRACCESS will only include results that meet all criteria (e.g., <u>all</u> Tasks completed by Contractors that nominally took more than 8 hours).
- If **Match Any** is selected, TRACCESS will include results that meet <u>any</u> criteria (e.g., Tasks either completed by Contractors OR those that took more than 8 hours).

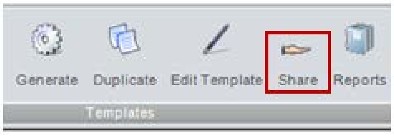
Check the **Show Filters In Report** option so you can easily see which criteria were used to generate the report.

Each report type has a Format criteria page. There you select how you want the report displayed in TRACCESS, and you can also choose if you want the report emailed and the format you prefer for the email attachment.

Click **OK** to apply your preferences and to finish creating your Template.



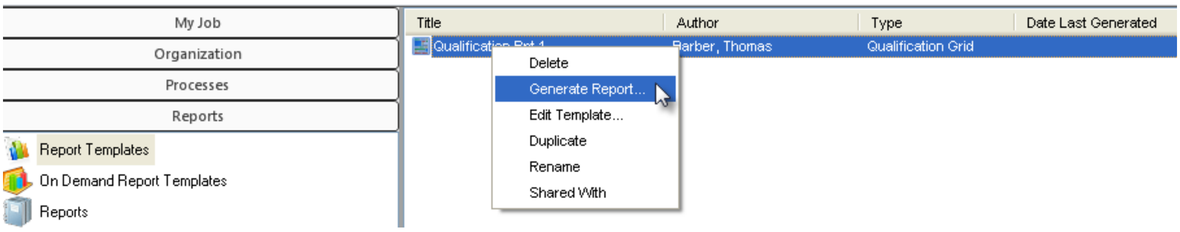
The template will be added to the Report Templates section and you will have an opportunity to name/rename your report. This section will track and list the Report Type, Author, Date Last generated and the number of reports generated against this particular report.



You can access other report functions from the Ribbon, notably **Share** the template with others.

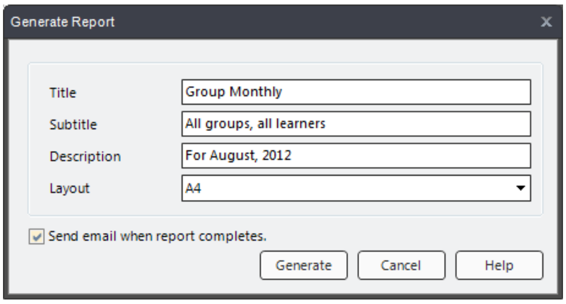
Generate the Report

You can run the report immediately after completing the Template Wizard or later. To run the report, right-click on the report title in the context pane then click **Generate Report.**



Add descriptive detail in the dialog box that appears. Here you can also check the box to indicate if you want to receive an email when the report has been generated.

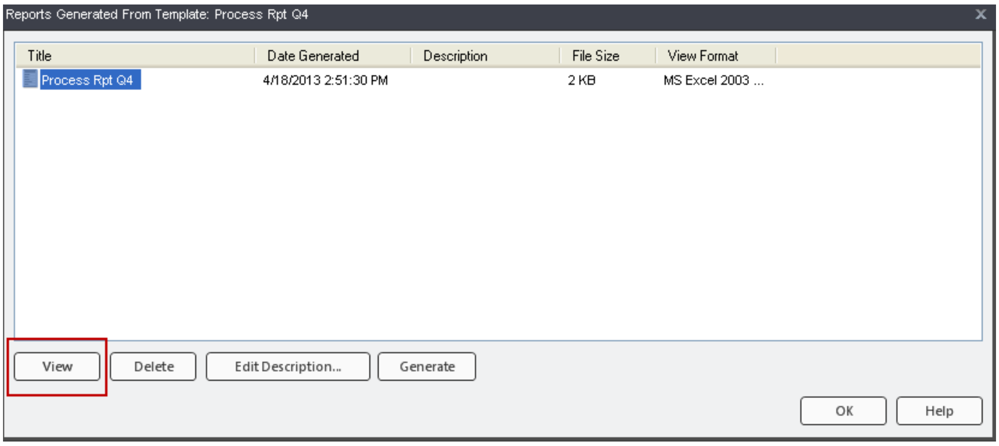
Click **Generate** to continue.



The report will be generated in the background even if you log out of TRACCESS. While the report is generating, it will display a small blue dot on the report icon which will clear when generation is finished. Although most reports run quickly, larger reports may take longer.

View the Report

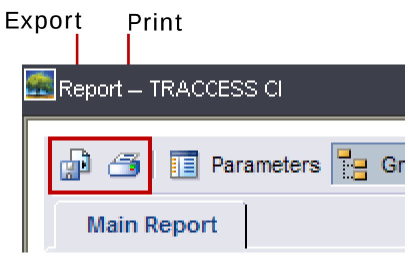
To view a report, click on the report title then click **View** in the dialog box that opens. If you selected the Word, PDF, or Excel format when preparing the Template Wizard, the report will open in that application.

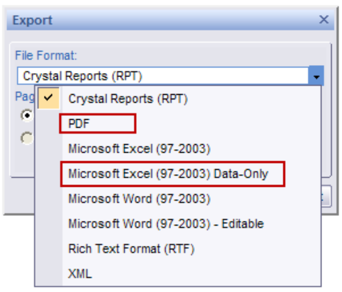


Export the Report

To easily export a report into another format, save the report in the TRACCESS report format when completing the Template Wizard.

When the TRACCESS report opens in the View function, a Ribbon appears with an Export and a Print button at the top left. Click the **Export** button to view the file format options available for the export function. As shown, you can export the TRACCESS report data in multiple formats. However, these two formats are recommended: PDF when you want to share the document with other employees; MS Excel Data-Only when you want to manipulate the data.





Note: *Learners and managers also have the option of quickly viewing qualification information by running reports directly from the Organization manager with On Demand Reports. The templates for on demand reports are created in the same way as standard reports, except no Organization Units or Learning is selected, since this is determined from where you run the reports from. On Demand Reports are most beneficial for managers who need to view specific information quickly.*

This completes the review of key report functions in TRACCESS CI.