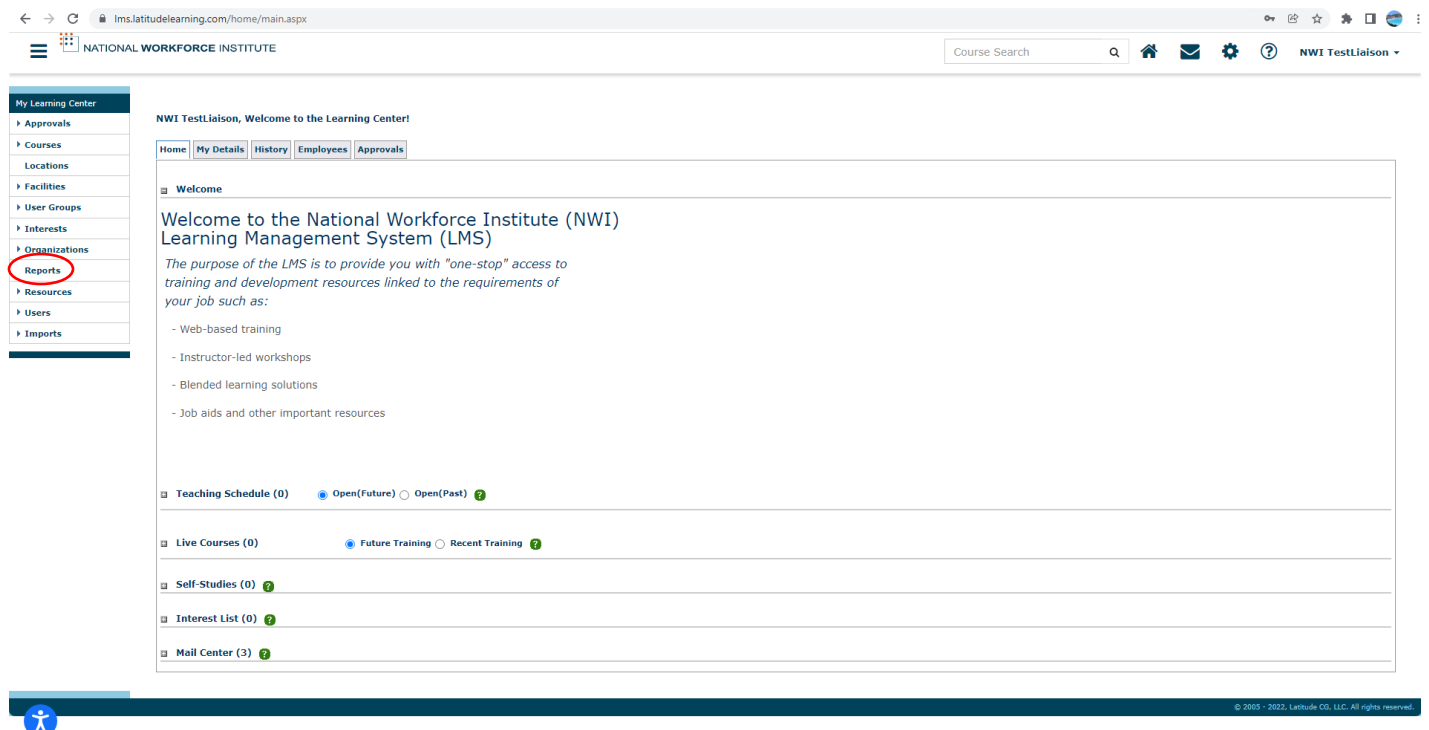


Using the Learning Management System (LMS) – Creating Reports - Custom

The Learning Management System (LMS) allows you to create a variety of reports – for example, active users reports, transcript reports, and courses completed reports.

Navigation

When you launch the LMS, you will see the Home Page. On the Home Page, you can see the “Reports” tab on the left menu sidebar. Click on “Reports.”

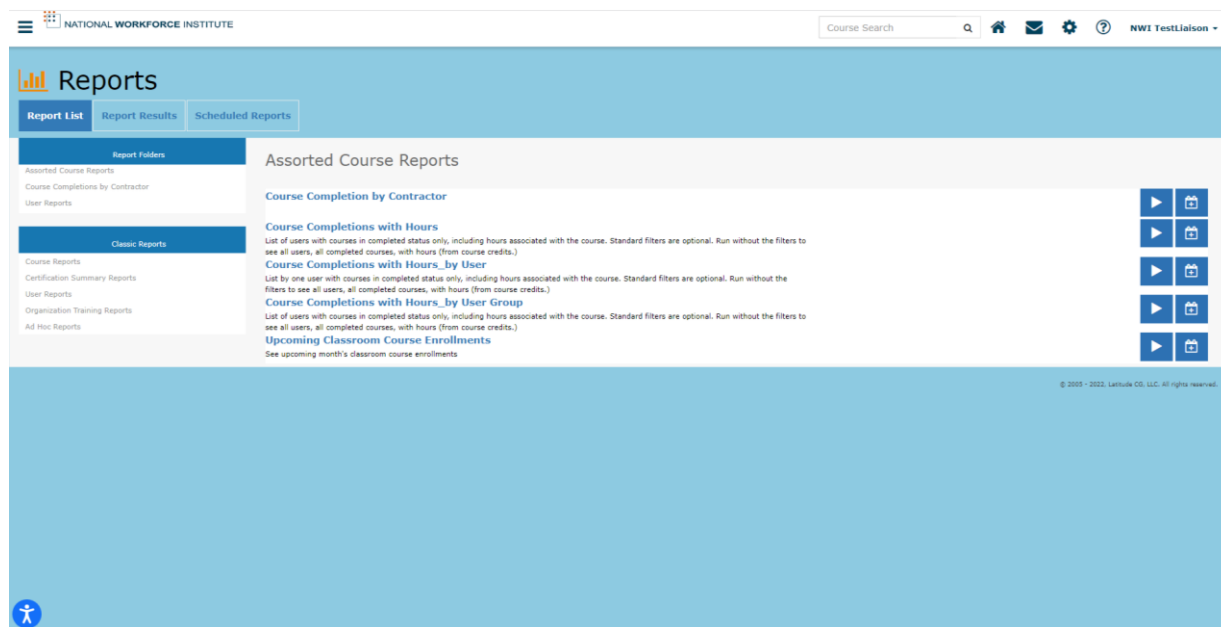


The screenshot shows the LMS Home Page for NWI TestLiaison. The left sidebar contains a 'My Learning Center' menu with options: Approvals, Courses, Locations, Facilities, User Groups, Interests, Organizations, Reports (highlighted with a red circle), Resources, Users, and Imports. The main content area displays a welcome message and a list of reports: Teaching Schedule (0), Live Courses (0), Self-Studies (0), Interest List (0), and Mail Center (3). The Reports section is currently selected, showing a list of reports with columns for Name, Description, and Actions.

Reports

The Reports page is divided in two sections:

- The first bold blue tab is labeled “Reports Folder.” This folder contains custom reports which have been created by the portal admins and are tailored to a specific reporting need.
- The second bold blue tab is “Classic Reports.” It contains basic reports built into the LMS.



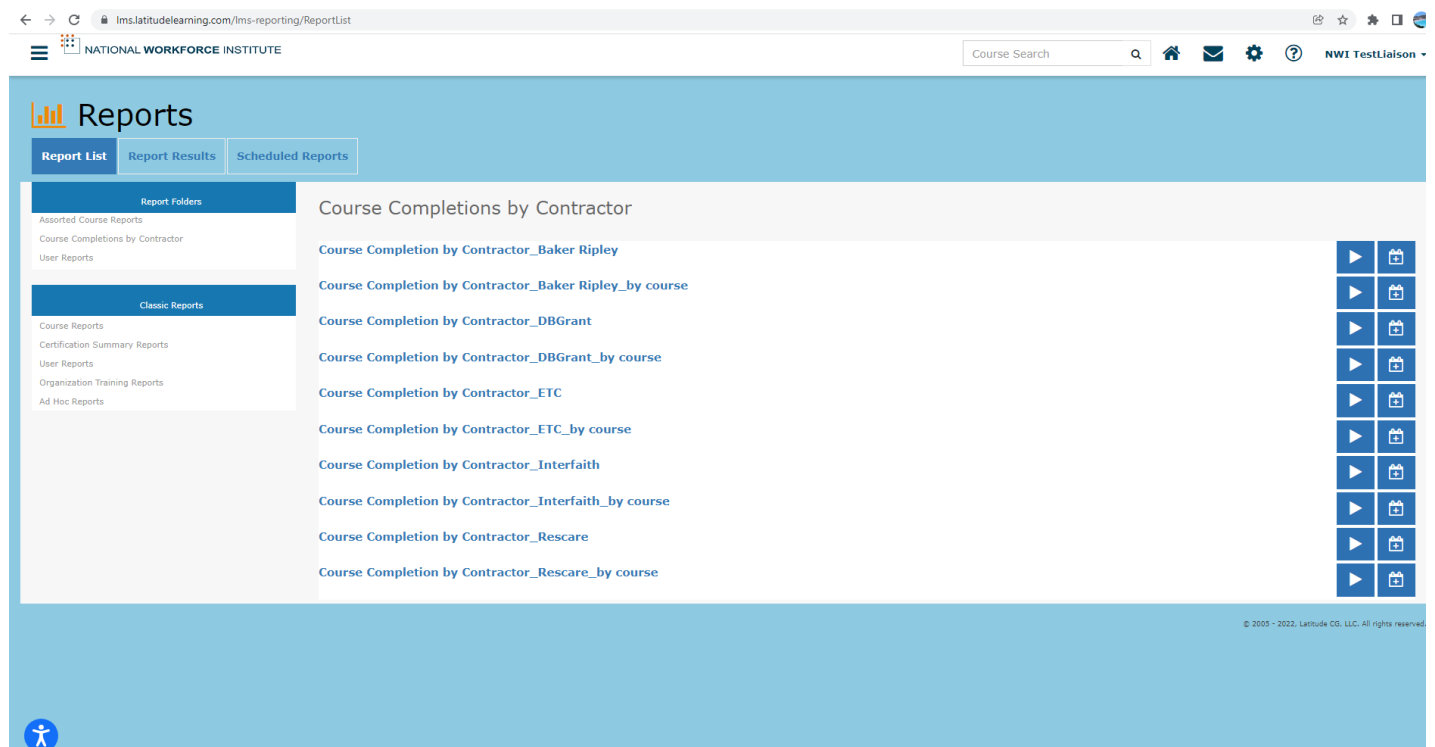
Assorted Course Reports

Note: When the Reports page opens, it will default to the first option listed under the Reports Folder, Assorted Course Reports. There are five (5) options available under Assorted Course Reports. Each option includes a description of the report.

- Course Completion by Contractor
- Course Completion with Hours
- Course Completion with Hours by User
- Course Completion with hours by User Group
- Upcoming Classroom

Course Completions by Contractor

The second option under the Reports Folder is “Course Completions by Contractor.” This is the same report that can be found in the first folder, but the contractor information has already been added for your convenience.



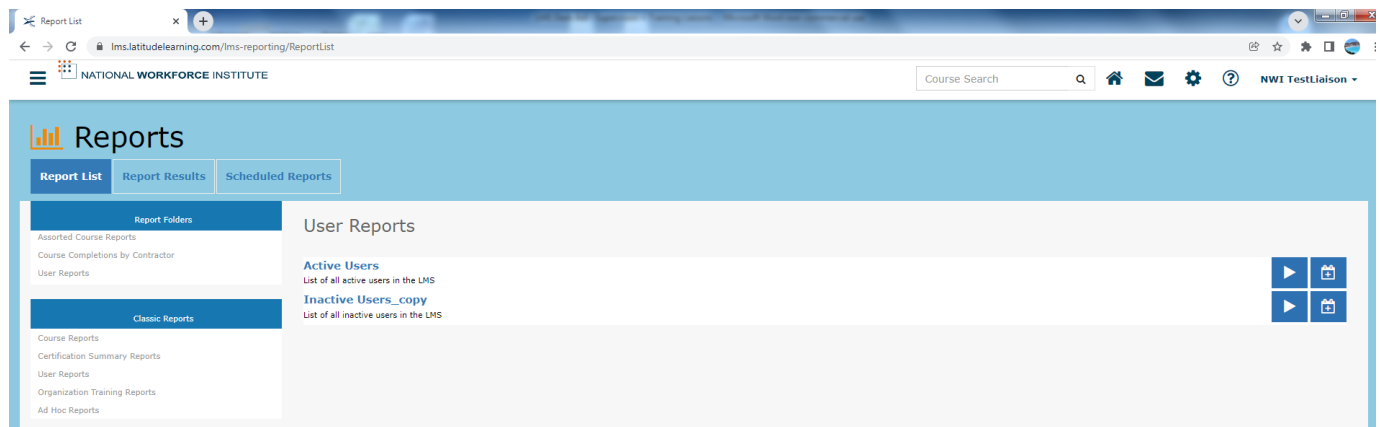
The screenshot shows the LMS Reporting interface. The browser address bar displays `lms.latitudelearning.com/lms-reporting/ReportList`. The page header includes the National Workforce Institute logo, a search bar, and navigation icons. The main content area is titled "Reports" and features a sidebar with "Report Folders" and "Classic Reports". The "Report Folders" section is expanded, showing "Assorted Course Reports" and "Classic Reports". The "Assorted Course Reports" folder is selected, displaying a list of reports under the heading "Course Completions by Contractor". The reports listed are:

- Course Completion by Contractor_Baker Ripley
- Course Completion by Contractor_Baker Ripley_by course
- Course Completion by Contractor_DBGrant
- Course Completion by Contractor_DBGrant_by course
- Course Completion by Contractor_ETC
- Course Completion by Contractor_ETC_by course
- Course Completion by Contractor_Interfaith
- Course Completion by Contractor_Interfaith_by course
- Course Completion by Contractor_Rescare
- Course Completion by Contractor_Rescare_by course

Each report has a play button and a download icon. The footer of the page displays the copyright notice: © 2005 - 2022, Latitude CO, LLC. All rights reserved.

User Reports

The third option under the Reports Folder is “User Reports.” It allows you to access active users in your organization.



The screenshot shows the LMS Reporting interface. The browser address bar displays `lms.latitudelearning.com/lms-reporting/ReportList`. The page header includes the National Workforce Institute logo, a search bar, and navigation icons. The main content area is titled "Reports" and features a sidebar with "Report Folders" and "Classic Reports". The "Report Folders" section is expanded, showing "Assorted Course Reports" and "Classic Reports". The "Assorted Course Reports" folder is selected, displaying a list of reports under the heading "User Reports". The reports listed are:

- Active Users
List of all active users in the LMS
- Inactive Users_copy
List of all inactive users in the LMS

Each report has a play button and a download icon.

Running Custom Reports

Once you select a report to run, you have two choices – either click on the arrow or click on the calendar. Click on the arrow if you want to run the report. Click on the calendar if you want to schedule a report so that it is created automatically at a time you select (e.g., daily, weekly, monthly). (See page 8 of this document).

NATIONAL WORKFORCE INSTITUTE

Course Search

Reports

Report List | Report Results | Scheduled Reports

Report Folders

- Assorted Course Reports
- Course Completions by Contractor
- User Reports

Classic Reports

- Course Reports
- Certification Summary Reports
- User Reports
- Organization Training Reports
- Ad Hoc Reports

Assorted Course Reports

Course Completion by Contractor

Course Completions with Hours
List of users with courses in completed status only, including hours associated with the course. Standard filters are optional. Run without the filters to see all users, all completed courses, with hours (from course credits.)

Course Completions with Hours_by User
List by one user with courses in completed status only, including hours associated with the course. Standard filters are optional. Run without the filters to see all users, all completed courses, with hours (from course credits.)

Course Completions with Hours_by User Group
List of users with courses in completed status only, including hours associated with the course. Standard filters are optional. Run without the filters to see all users, all completed courses, with hours (from course credits.)

Upcoming Classroom Course Enrollments
See upcoming month's classroom course enrollments

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When you click on the “Run” icon, you will be directed to a new page titled “Course Completions by Contractor” that has filters that need to be entered.

The first row has a filter called “Enroll Date” to enter the start date and end date for the report.

Reports

Report List | Report Results | Scheduled Reports

Report Folders

- Assorted Course Reports
- Course Completions by Contractor
- User Reports

Classic Reports

- Course Reports
- Certification Summary Reports
- User Reports
- Organization Training Reports
- Ad Hoc Reports

Course Completion by Contractor

Standard Filters

Enroll Date	Custom	start	end
Transcript Status	Is	Transcript Status	
Organization	In Hierarchy	Organizations	

Run Cancel

When you click on the “start” box, a calendar will pop up.

Reports

Report List | Report Results | Scheduled Reports

Report Folders

- Assorted Course Reports
- Course Completions by Contractor
- User Reports

Classic Reports

- Course Reports
- Certification Summary Reports
- User Reports
- Organization Training Reports
- Ad Hoc Reports

Course Completion by Contractor

Standard Filters

Enroll Date	Custom	start	end
Transcript Status	Is	Transcript Status	
Organization	In Hierarchy	Organizations	

Run Cancel

Click on the date that you want your report to begin and the system adds that date to the bar, then repeat for the end date.

If you do not want a “Custom” date range, you can click on the second bar and select from the different options – Last 7 days, last 30 days, etc.

If the “Custom” filter is changed and “Last 30 days” option is selected, you do not fill in any dates.

The second row of bars that need to be completed is the Transcript Status filter. When you click on the third bar in that row, you choose which option you want in the report.

The screenshot shows the 'Reports' section of the National Workforce Institute portal. Under 'Report Folders', 'Course Completions by Contractor' is selected. The 'Standard Filters' section includes 'Enroll Date' (set to 02/15/2022), 'Transcript Status' (set to 'Is'), and 'Organization' (set to 'In Hierarchy'). The 'Transcript Status' dropdown menu is open, displaying a list of options: 'Attend No Bill (Pass)', 'Cancel', 'Fail', 'Incomplete', 'Ineligible', 'Launched', 'No Show', and 'Pass'. The 'Pass' option is highlighted at the bottom of the list. To the right of the filters are buttons for '+', '-', and 'Run'.

For example, if you only want to see users that successfully completed a course, then click on “Pass” as this is usually the desired selection.

This screenshot shows the same 'Course Completion by Contractor' filter page. The 'Transcript Status' dropdown menu is now closed, and the 'Pass' option is selected, as indicated by a red circle around the word 'Pass' in the dropdown list. The 'Run' button is visible at the bottom right.

If you want to see anyone who has attempted the course or even just launched it, leave the default “Transcript status” on the bar. Leaving this bar without choosing an option will allow all options to appear in your search – fail, incomplete, launched, pass, etc.

This screenshot shows the 'Course Completion by Contractor' filter page. The 'Transcript Status' dropdown menu is closed, and the 'Transcript Status' option is selected, as indicated by a red circle around the text 'Transcript Status' in the dropdown list. A red arrow points to the 'X' icon at the right end of the 'Transcript Status' bar, indicating how to clear the selection. The 'Run' button is visible at the bottom right.

Note - If you make a selection and then change your mind, you can click on the X at the right of a bar to clear your selection and start again.

The third row is for selecting the organization's location for the report.

Course Completion by Contractor

Standard Filters

Enroll Date	Custom	02/14/2022	02/28/2022
Transcript Status	Is		
Organization	In Hierarchy		

Pass

- BR Astrodome CO BRASTRODOME
- BR Baytown CO BRBAYTOWN
- BR CLEAR LAKE BRCLRLAKE
- BR East End CO BREASTEND

Run Cancel

The indicated bar allows you determine the number of users who will be included in your report. If you leave the box without making a choice, the system will automatically include all locations under your profile. If you click on the dropdown menu, it will show you the locations under your profile and you can select any single location you like. In the example below, for example, the liaison could ask to include only users at Astrodome in their report.

Course Completion by Contractor

Standard Filters

Enroll Date	Custom	02/14/2022	02/28/2022
Transcript Status	Is		
Organization	In Hierarchy		

Pass

- BR Astrodome CO

Run Cancel

The last step is to click the run button at the bottom right.

Course Completion by Contractor

Standard Filters

Enroll Date	Custom	02/14/2022	02/28/2022
Transcript Status	Is		
Organization	In Hierarchy		

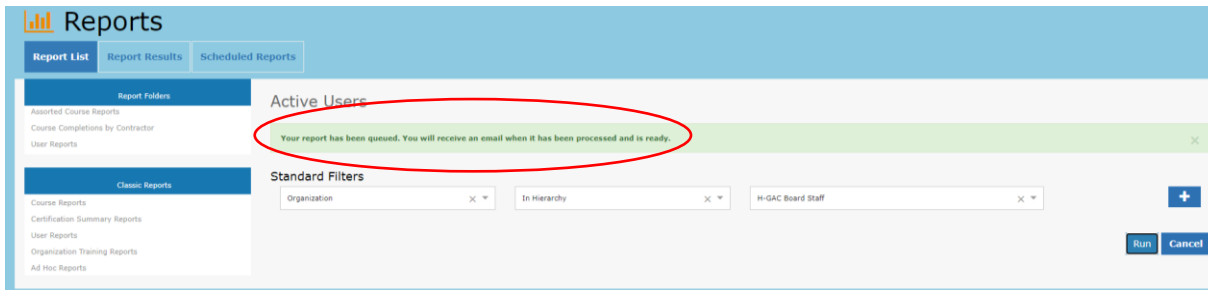
Pass

- BR Astrodome CO

Run Cancel

Custom Reports Results

Once you click to run a custom report, the system will give you a message that your report is in the queue and being processed. The time required to process reports varies, depending on the number of users included in them. For a limited number of users, reports take a few minutes. For reports that include the entire system, reports may take longer. The system will send you an automated email when the report is ready. Or, you can keep checking the system for completion.

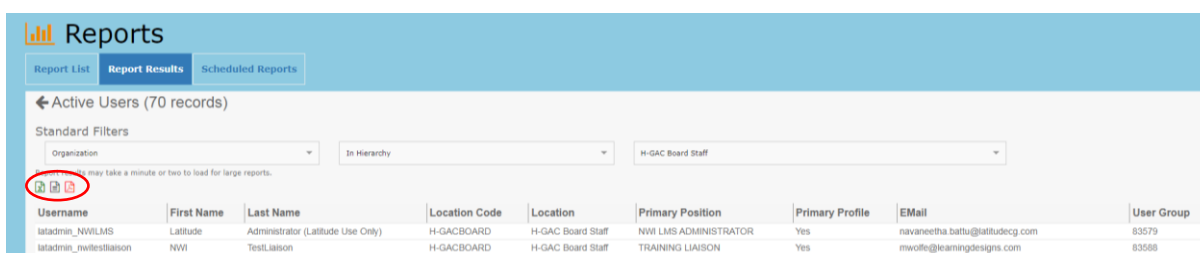


If you want to check for a report, click on the Report Results tab on the Reports page.



You will see a list of older reports you have run, as well as the new report you created. The new report will be at the top of the list. Click on the report to see the results and select an option for saving the document.

Review results online for up to 30 days, or click the export icons to download the file and save it permanently. File format options are **Excel (XLSX)**, **Comma Separated Values (CSV)**, **Portable Document Format (PDF)**.



When you hover over each icon, it will show you the name of the report; when you click, the document is downloaded to your computer.

Custom Report Scheduling

To schedule a report to be run automatically at a certain time each day, week, or month, click on the “Calendar” icon (See page 4). The screen below will appear.

The screenshot shows the 'Reports' section of the National Workforce Institute interface. The 'Add Schedule: Course Completion by Contractor' form is displayed. It includes a sidebar with 'Report Folders' and 'Classic Reports'. The form has sections for 'Standard Filters' (Enroll Date, Transcript Status, Organization, Custom, Is, In Hierarchy, START, end, Transcript Status, Organizations), 'Schedule Report' (Schedule Range: 2/15/2022 to 2/15/2023), 'Notes - Optional', and 'Frequency' (Daily, Weekly, Monthly, On Demand). A red box highlights the 'Weekly' option in the frequency section.

- Add the time period for your report. If you select the “Custom,” be sure to add an end date, unless you want the report to run forever.
- Select the Transcript Status desired.
- If you want to schedule a report for all users in your organization, leave the third dropdown bar blank. If you want to schedule a report for only a certain location, select that location from the dropdown menu.
- Indicate the frequency of your report – daily, weekly, or monthly. If you choose a daily report, you will get an email each day telling you your report is ready in the Report Results Folder. If you choose “Weekly,” you will be prompted to choose which day of the week you want the report run, and then receive an email that it is ready on that day. If you choose “Monthly,” you will see a calendar and need to select a day of the month when you want the report. This option will also generate an automated email that your report is ready for viewing.

Selecting the “Weekly” option

The screenshot shows the 'Add Schedule: Active Users' form. The 'Weekly' option in the frequency section is selected and circled in red. Below it, a table of days of the week is displayed, with a red box highlighting the entire table. The table has columns for Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday.

Note: For this scheduled report, the Monthly option is selected and the first day of the month was selected. You can choose any day of the month for the report to run by clicking on that day.

Add Schedule: Active Users

Standard Filters

Organization: [dropdown] In Hierarchy: [dropdown] Organizations: [dropdown] +

Schedule Report

Schedule run daily between the hours of 12AM and 6AM ET

Schedule Range

2/1/2022 [calendar icon] Range End: [calendar icon]

Notes - Optional

[text area]

Frequency

Daily Weekly **Monthly** On Demand

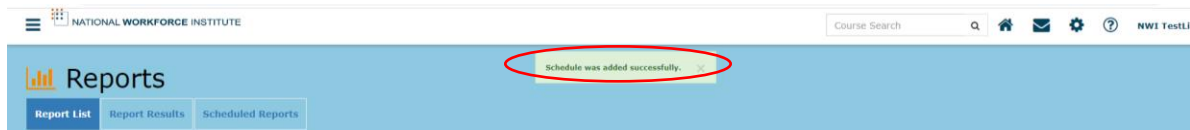
If the 31st is chosen, the last day of the month will be used if the month has fewer than 31 days.

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Save Cancel

Click on the “Save” button at the bottom right of your screen to save the scheduled report.

The circled notation shows that the scheduling was successful.



Scheduled Reports Folder

For a list of your scheduled reports, click on the third tab under “Reports.” This page will show the saved course reports that you have on a schedule, as well as, the report frequency and scheduled date range.

You are able to run them (arrow), edit (pencil), or delete them (garbage can).

Reports

Report List Report Results **Scheduled Reports**

Schedule Name	Frequency	Schedule Range	Action
Course Completion by Contractor_DBGrant	Monthly (2)	1/14/2021 - 1/14/2022	[run] [edit] [delete]
Course Completions with Hours	Monthly (1)	1/26/2021 - 1/26/2022	[run] [edit] [delete]
Course Completions with Hours	Monthly (1)	1/27/2021 - 1/27/2022	[run] [edit] [delete]

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