User Documentation

Job Aid: Success Center Standard Reports

Date: December 9, 2019
Version: 3

DOCUMENT OVERVIEW:

Success Center Standard Reports is the process a user follows to run common training reports in the Success Center application.

TIPS AND TRICKS:

Special security access may be need to be requested via the *Success Center Security form* to view some Standard Reports.

STEP-BY-STEP PROCEDURE:

1. Open the *Success Center* application and log in.

2. Hover over *Reports* and click **Standard Reports**.

3. The following common reports are displayed under *Training.* Click each link and follow the corresponding steps for each report:

    - **Training Progress Summary Pie Chart** – This option displays a pie chart of user progress for a specific course for a specific user group such as a cost center. Results will show statuses of *Completed*, *In Progress*, *Registered*, *Past Due*, *No Show*, *Withdraw* and *Not Started/Not Registered* depending on the type of training.

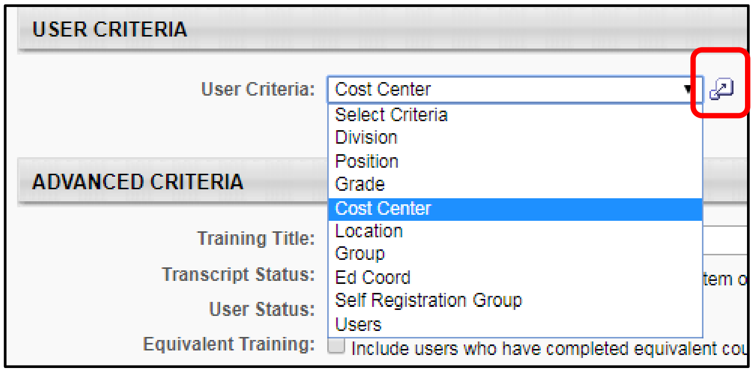
    - **Enterprise Past Due Training** – This option displays users with past due training. Results will only include training that was assigned with a due date.

    - **Enterprise Training** – This option displays selected training status of employees and can be used for one course or all assigned courses.

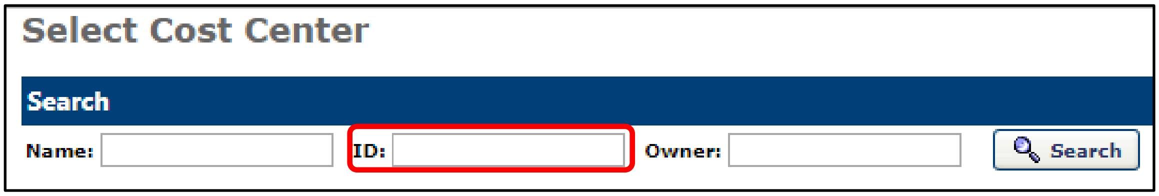
Training Progress Summary Pie Chart

1. Enter the *Date Criteria* for the date range you want for the report.

2. Select the **User Criteria**. Common criteria used is a single *User*, *Cost Center* or *Location*. Click on the **Search icon** to enter the specific criteria



Note: Use the **ID** field to enter a specific 6-digit department cost center number, such as 200123 in 10000.2003010000.*200123.*



3. Under the *Advanced Criteria* section, search for the course code or training title.

4. Select any other **Advanced Criteria** for the report, and click **Search**.

Note: If you want to include users who may not have the training on their transcript yet, check the box next to *Transcript Status: Include users who do not have this training on their transcript or have not activated the training item.*

5. A pie chart will display with a list of users and statuses below.

Note: The list of users displays 10 users per view. Click on **Next** to view the next 10 users. The sections of the pie chart may be selected to view a list of users in a specific status.

6. Click **Export to Excel** to view the full report.

Enterprise Training Past Due

1. Enter the *Date Criteria* for the date range you want for the report.

2. Select the **User Criteria.** Common criteria used is a single *User*, *Cost Center* or *Location*. Click on the **Search icon** to enter the specific criteria

3. Under the *Advanced Criteria* section, search for the course code or training title.

4. Select any other *Advanced Criteria* for the report and click **Search.**

Note: If you want to include users who may not have the training on their transcript yet, check the box next to *Transcript Status: Include users who do not have this training on their transcript or have not activated the training item.*

5. Under the *Process Report* section, the report title is optional. The title defaults to *Enterprise Past Due Training* if no title is entered.

6. Click on **Process Report** to run the report.

Note: Allow a few minutes for the report to process. You may need to refresh your window for the screen to update.

7. To view the report in *Excel*, click on the **Excel** icon .

Note: If you change any of the criteria above in the report, click the **Process Report** button again. Allow time for the report to process. You may need to refresh your screen.

Enterprise Training

1. Enter the *Date Criteria* for the date range you want for the report.

2. Select the **User Criteria.** Common criteria used is a single *User*, *Cost Center* or *Location*. Click on the **Search icon** to enter the specific criteria

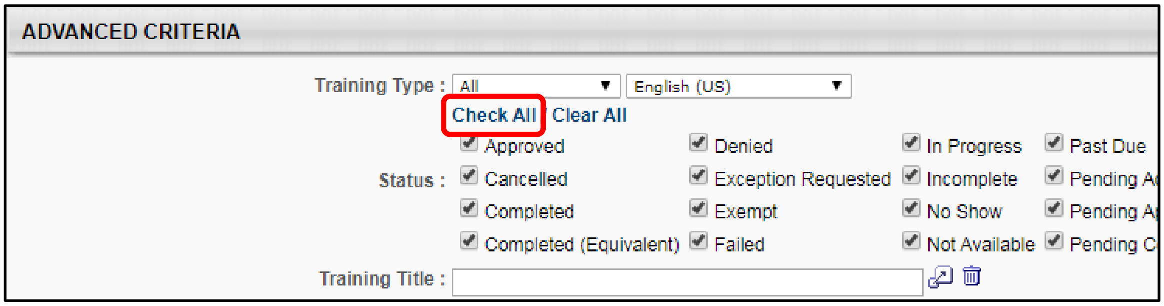
3. Under the *Advanced Criteria* section, search for the course code or training title.

4. Select any other *Advanced Criteria* for the report and click **Search.**

Note: If you want to include users who may not have the training on their transcript yet, check the box next to *Transcript Status: Include users who do not have this training on their transcript or have not activated the training item.*

5. If you want to view all training assigned for the *User Criteria* you have selected, leave the *Training Title* field blank under the *Advanced Criteria* section.

6. To select all transcript statuses, click **Check All** by *Status.*



7. Check any other **Advanced Criteria** for the report.

8. Click **Search** to view the report.

9. Click **Export to Excel** to view the full report.