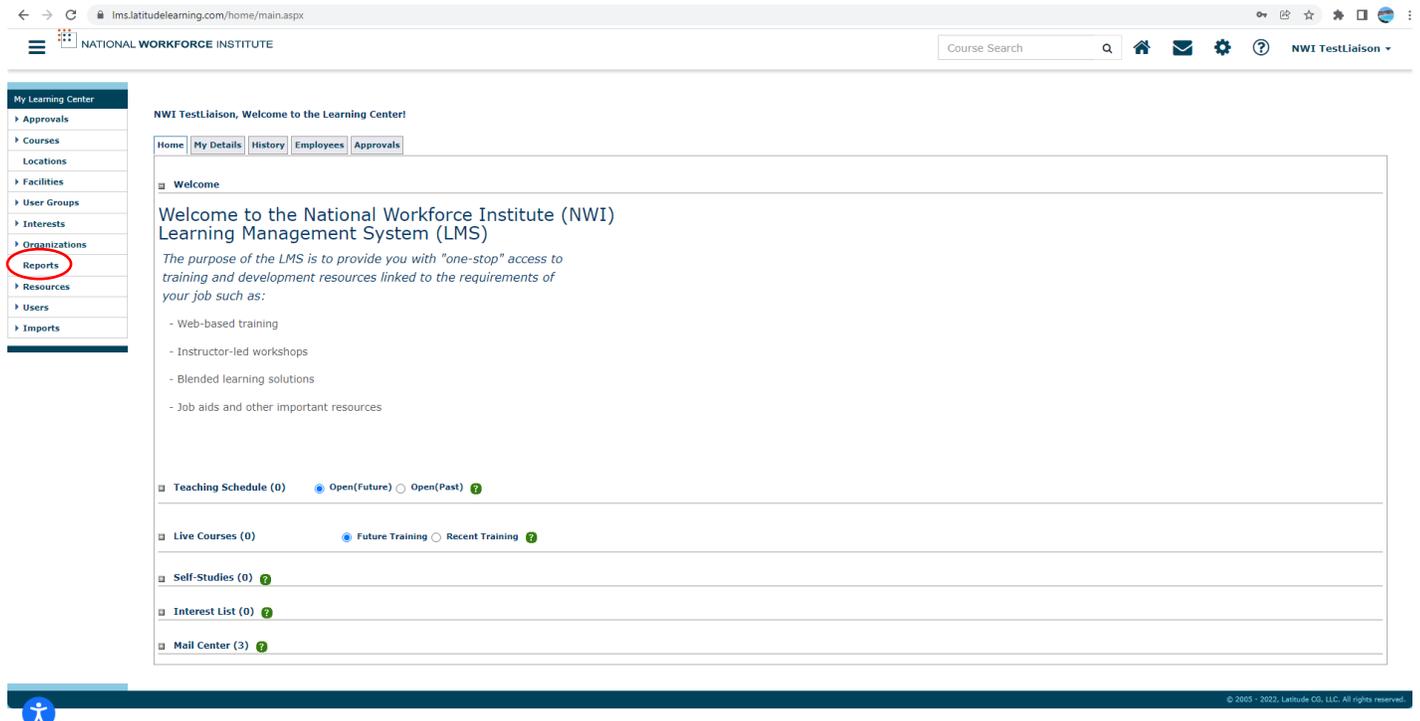


Using the Learning Management System (LMS) – Creating Reports - Classic

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 navigation menu with the following items: My Learning Center, Approvals, Courses, Locations, Facilities, User Groups, Interests, Organizations, Reports (circled in red), Resources, Users, and Imports. The main content area displays a welcome message: "Welcome to the National Workforce Institute (NWI) Learning Management System (LMS)". Below the welcome message, there is a list of training and development resources: Web-based training, Instructor-led workshops, Blended learning solutions, and Job aids and other important resources. The page also features several status indicators: Teaching Schedule (0), Live Courses (0), Self-Studies (0), Interest List (0), and Mail Center (3). The footer of the page includes the copyright information: © 2005 - 2022, Latitude CO, LLC. All rights reserved.



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.

Custom Reports

Instructions for Custom Reports are on a separate desk aid.

The screenshot shows the National Workforce Institute Reports page. The 'Report List' tab is selected. Under the 'Report Folders' section, the 'Assorted Course Reports' folder is expanded, showing 'Course Completion by Contractor' as the selected report. The main content area displays details for 'Course Completion by Contractor', including a description and a list of other reports like 'Course Completions with Hours' and 'Upcoming Classroom Course Enrollments'. A sidebar on the right contains navigation icons.

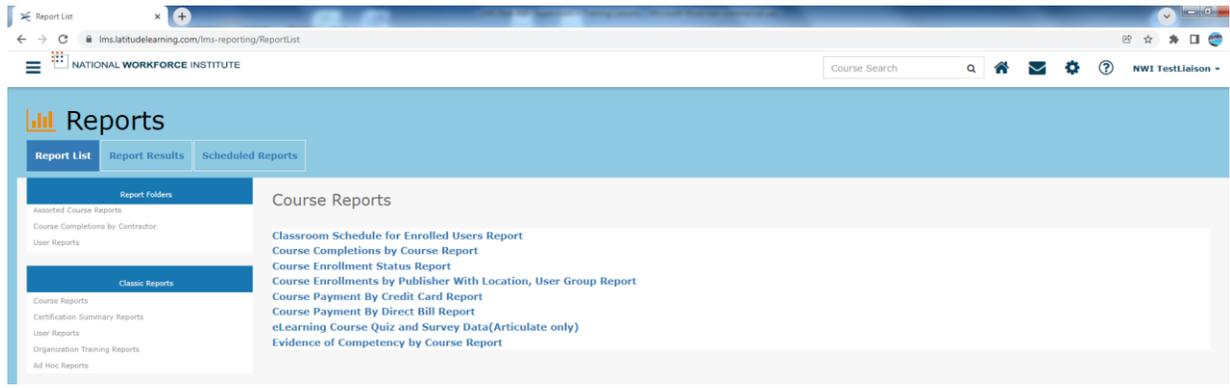
Classic Reports

To select a classic report, click on a folder listed under the Bold Blue Bar “Classic Report” on the Reports page. Each of the options will open up a page with the available reports under that option. Most of the custom reports are based on the classic reports but refined with the details required by Workforce Solutions.

The screenshot shows the National Workforce Institute Reports page. The 'Report List' tab is selected. Under the 'Classic Reports' section, the 'Certification Summary Reports' folder is highlighted with a red box. The main content area displays the text 'Select a report to get started'.

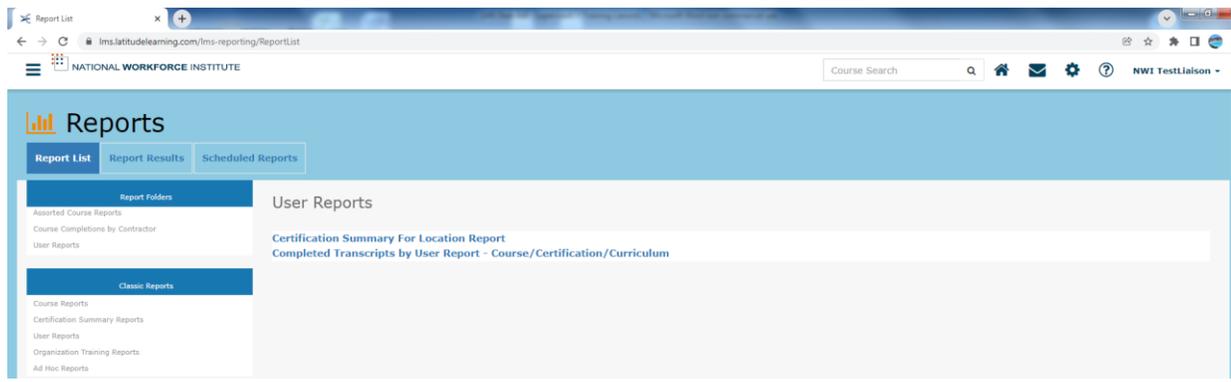


The first option is Course Reports:



The second choice is "Certification Summary Reports" which currently is not used.

The third option is User Reports:



The fourth option is Organization Training Reports:





- ❖ To run a Classic Report, click a **Folder Name** and select the desired **Report Name**.
- ❖ On the standard report page, apply **Filter** criteria as needed.
 - Select the date range for your report
 - Select the location for your report – You have the option to choose one location or Clear the basket which allows the search to cover all locations under your profile
 - Select Student status – All or Active or Inactive
 - Select Sort by – Default, Course Code, Position, Student name
- ❖ Select the report **Delivery Method** and **Delivery Format**.
- ❖ Click **Run Report**.

Classic Reports

Report Name: Completed Training History by Location

Filter

* Start Date :

* End Date :

Location : or Choose a location

* Student Status :

Sort By :

Delivery

* Delivery Method :

* Delivery Format :

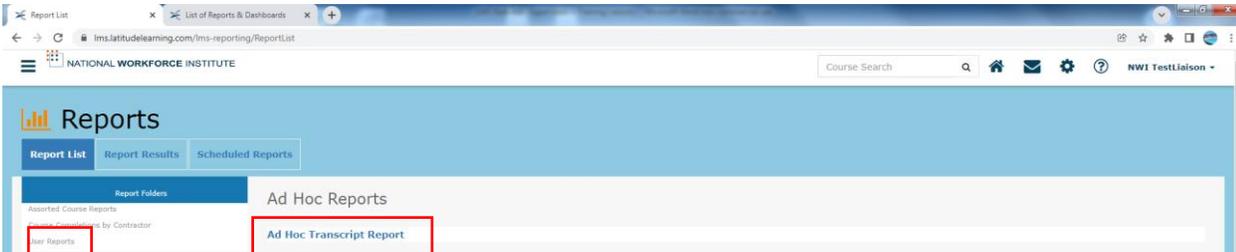
[Run Report »](#)

[» Reports » List of Reports & Dashboards](#)

The last choice under Classic Reports is Ad Hoc Reports:

Ad Hoc Reports

After you click on the Ad Hoc Report, you will see the report that is available and you need to click on the “Ad Hoc Transcript Report.”



This is an additional report that gives the Administrator the ability to create an Ad Hoc Report with a wide range of query criteria and display fields. The Ad Hoc Report can be used by Administrators to capture training for a narrow population or for the entire organization. Administrators can also specify input criteria and output fields.

The Ad Hoc Report is the perfect way to generate transcript information for a custom user population with a highly customizable set of query criteria and display fields. It will help you keep on top of your students’ training progress, for a narrow or wide report population.

You may choose to build your query criteria to include one or more of the following:

- Business Unit
- Division
- Location
- Department
- User Group
- Position
- Role
- Courses
- Users
- Facilities



The report needs a date range and then each following line can either be left blank for a wide search range of all users or you can narrow the search down by choosing a specific location or user group or specific course, etc.

Below, the filter options, you will see your Column Options for your report. Click on the box in front of the columns that you would like to see in your report. A report showing first name, last name, and location is using standard options.

If you chose to run the report showing all courses, then check the Course name and/or Course code box so you can see each course listing.

Transcript Status should also be checked as the report will show all – attempted, launched, pass, fail, and incomplete – and if completions are the goal, you can eliminate the other statuses from the report.

Delivery method is preset to CSV

Click “Run Report” at the bottom left and your report will show up on your download files.

Report Name: Ad Hoc Transcript Report

Select the desired filter criteria and report columns. If no columns are selected then ALL columns listed will be reported. Maximum of 50,000 transcripts can be shown on the report

Filter

Start Date : 
(MM/DD/YYYY)

End Date : 
(MM/DD/YYYY)

Business Unit :

Division :

Location :

Department :

User Group :

Position Group :

Position :

Role :

Instructor :

Major :

Enrollment Status :

User Status :

Courses : Choose Courses

Users : Choose Users

Facilities : Choose Facilities

Locales : Choose Locales

Report Columns (Default All) :

- Accept Date
- Attempts
- Attended
- Bill Status



Classic Reports

- Has Admin Overridden Conflict
- Incomplete Note
- Instructor Name
- Last Name
- Last Update
- Launch Date
- Locale Name
- Location
- Major
- Middle Name
- Offering
- Offering End
- Offering Start
- Percent Complete
- Position
- Position Group
- Post-Test Score
- Pre-Test Score
- Request Required
- Score
- Score Code
- Score Date
- Score Type
- Transcript Note
- Transcript Source
- Transcript Source Code
- Transcript Status
- Transcript Type
- User Account End Date
- User Group
- User Role
- Username
- Waitlist Date

Delivery

* Delivery Method :

Conclusion

Custom Reports were created from the most used Classic Reports and include a description of what the report will provide to help choose the correct report desired. Previously, it could take trial and error using Classic reports to get the report that is what you needed. You also are not able to schedule a report using the Classic Reports.