Generating a Standard Report in the LMS

- 1. After logging on to the LMS through BEACON/SAP, click on REPORTS and select STANDARD REPORTS
- 2. Click on the TRAINING tab and select the desired report.
 - For most reports you will generate a Training Progress Summary Pie Chart report.

Home Learning Reports ILT Admi	n
ports	
k on a report category to view those reports. You ma	y search for any reports by title or description.
	<u></u>
Track Employees ILT Training	
Cartification Summary Banart	Tan Training Home
Displays summary information for certifications.	Displays the top training items during the specified time period.

3. You will then enter your report criteria:

DATE CRITERIA

For Date Criteria, you can either enter the calendar dates or you can choose options from the drop down box.

DATE CRITERIA				
	Date Criteria:	Select 🔽	From:	То:

USER CRITERIA

For most reports, you will want to generate a report that represents your entire facility/location/section. To do that, you will select **ORG UNIT**.

User Criteria:	The availability citeria that you selec	a win only include em
	Select Criteria	
	Select Criteria	
	ORG UNIT	
	Position	
ADVANCED CRITERIA	Cost Center	
	Location	-
Training Title:	Group	
Training Title:	Employee Group	3
Transcript Status:	Employee Subgroup	item on the
	SOC Code	intern off the
User Status:	Personnel Area	
Equivelent Tesision	Education Level	
Equivalent i raining:	Statutory Exempt Type Code	ent courses
Include Removed Training:	Org Path Structure	r transcript
interact reality of the reality.	County Code	r transcript
	Pay Scale Type	
	Pay Scale Area	
	Users	

Once you select ORG UNIT, you will locate your specific location. To do that, click on the pop out box ²beside ORG UNIT. This will open another window to allow you to find your location.

USER CRITERIA		
	lines Criteria	The availability criteria that you select will only include employees who meet the following criteria: (ORG UNIT is or below Public Safety)
	user criteria:	ORG UNIT

You will then have to drill down through the organization to find your specific location. When there is a $\textcircled{\bullet}$ beside of a location, this mean there are subsections. To continue drilling down, click $\textcircled{\bullet}$ until you find your facility/location/section.

Hierarchy				
ADD	TITLE			
•	🗄 Public Safety			

Top No	e:Public Safety:PS Office of the Secretary (OS):PS Adult Correction Division:PS AC Operations	: PS AC OPS Prisons : COR SO DS2 PRI D	IR SS : COR SO DS2	PRI DIR SS EASTERN REG
		~		(13 Results) 1 2 > >>
Hiera	rchy	· · · · · · · · · · · · · · · · · · ·		
ADD	TITLE			ID
۰	COR SO DS2 PRI DIR E ADMIN SVCS	. 6		21015136
۰				21015130
Φ	COR SO DS2 PRI DIR E CARTERET			21015137
Φ	COR SO DS2 PRI DIR E COR DIST MGR			21015140
۰	COR SO DS2 PRI DIR E CRAVEN			21015134
۰	⊞ COR SO DS2 PRI DIR E DUPLIN			21015138
Φ	COR SO DS2 PRI DIR E EASTERN			21015135
Φ	COR SO DS2 PRI DIR E GREENE			21015139
۰	COR SO DS2 PRI DIR E HYDE			21015133
•	COR SO DS2 PRI DIR E MAURY			21015131

When you have found your facility/location/section, click the 🎐 in the add column.

Helpful hint: If you need to go back up the hierarchy, you can click on the previous nodes in the header. **Helpful hint:** Once you have found your location, make note of the ID Number. You can enter this ID Number in future reports instead of having to drill down every time you generate a report.

Then click **DONE**.

Training Criteria

You will then select the Training you wish to report on. Select the 🔑 to find the training.

ADVANCED CRITERIA	N
Training Title:	
Transcript Status:	Include users who do not have this training item on their transcript or have not activated the training item.
User Status:	Include inactive users
Equivalent Training:	Include users who have completed equivalent courses in the report.
Include Removed Training:	Include training that was removed from user transcript

You can then search for training titles or keywords. If you just click SEARCH with no keywords or title entered you will see a list of every training that is in the catalog.

Search F	Search For Training						
Include the	Include the following training types:						
Online Class	Event Quick Course	Curriculum 🗹	Test 🗹 External Training	🗹 Library	Material	Posting	Video
Search by Title or Keyword:							
		English (US) 🔍	h)earch				

For example, we are reporting on the PREA HIRING AND PROMOTIONS PROHIBITION so PREA is the keyword.

Sear	Search by Title or Keyword:					
PRE/	A	Eng	glish (US) 🔍	Searc	:h	
					« Previous 1-5 of 5 💌 Next »	
Sea	rch Results					
ADD	TITLE	ТҮРЕ	PROVIDER	PRICE	DESCRIPTION	
ø	PREA Hiring And Promotion Prohibitions	Policy	Public Safety	\$.00	PREA Hiring and Promotion Prohibitions Employee Statement	
•	PREA Hiring And Promotion Prohibitions	Curriculum	Public Safety	\$.00	PREA Hiring and Promotion Prohibitions The North Carolina Department of Public Safety must adhere to the United States Department of Justice Final Rule on the "National Standards to Prevent, Detect, and Respond to Prison Rane Under the Prison Rane Elimination Art	

Note: For generating reports on the PREA HIRING AND PROMOTIONS PROHIBITION, you <u>MUST</u> select the **CURRICULUM** since this assignment is comprised of 2 pieces—the policy acknowledgement and the questions.

When you find the training you wish to report on, click the 🍄 to select the training title.

4. Review your report criteria

DATE CRITERIA			
Date Criteria:	This Year 💌 From: 1/1/2013 🛄 To: 12/31/2013 🛄		
USER CRITERIA			
User Criteria:	The availability criteria that you select will only include employees who meet the following criteria: (ORG UNIT is or Select Criteria		
ADVANCED CRITERIA			
Training Title:	PREA Hiring and Promotion Prohibitions		
Transcript Status:	Include users who do not have this training item on their transcript or have not activated the training item.		
User Status:	Include inactive users		
Equivalent Training:	Include users who have completed equivalent courses in the report.		
Include Removed Training:	Include training that was removed from user transcript		
[Search		

Note: If you have employees who may have let their NCID deactivate, you will also need to make sure that the INCLUDE INACTIVE USERS box is checked. You may or may not choose any of the advanced criteria depending on what information you desire in your report.

When you are ready to generate the report, click SEARCH

5. Your report is generated



You will then get a report with a pie chart to indicate compliance with a report below. You can click on any segment of the pie chart to see a list of employee in that category. In the lower portion of the report, you will see a list of all employees in that org unit. The column headings allow you to sort on screen.

Alternatively, you can export directly to MS Excel or you can select a printable version by selecting the appropriate icon.