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If you are an administrator or manager, you can access SkillSoft Administrator by clicking Admin in the upper-right corner of the SkillPort home page.

From the Administrator home page, you can access the following options on the navigation bar:

- **Users & Groups**: Use this area to create and manage users and groups.
- **Content**: Use this area to create and manage the SkillPort Catalog, learning programs, evaluations, and credentials.
- **Display**: Use this area to customize the SkillPort user interface.
- **Configuration**: Use this area to configure system settings.
- **Reports**: Use this area to run reports.

From any of these areas, you can select:

- **Admin Home** to return to the Administrator home page.
- **Exit to SkillPort** to return to the SkillPort interface for end users.
- **Help** for instructions on how to use SkillPort Administrator.

**Note**: This administrator guide provides information on only tasks that you perform on an ongoing basis. For complete information on the SkillPort Administrator, see the SkillPort Administrator Help.
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Working with Users

Find a User
You can quickly search for a user that you need to view or modify.

To find a user

1. Click **Users & Groups | User Management** on the navigation bar.

   The User Management page appears, which includes search controls at the top.

2. To perform a basic search:
   a. For **Search**, select **User**, and enter a user name, first name, last name, or email address. You can also use an asterisk (*) as a wildcard that represents one or more characters.
   b. Click **Search**.

3. To perform an advanced search:
   a. Click the **Advanced Search** link in the upper-right corner.
   b. Use the additional fields provided to specify your search criteria.
   c. Click **Search**.
Users & Groups

The search results are displayed on the Search Results tab in the left pane. You can click the org code for any user in the results to find the user's location in the group hierarchy.

![Users and Groups Search Results]

Working with Groups

You can add users to organizational groups ( ). You can then use the groups to control users' access to learning assets. The following are tips for working with organizational groups:

- Users can be part of more than one group. No matter the number of groups in which a user appears, there is still only ONE record for that user in the database.

- If a group contains a very large number of users, it is further subdivided alphanumerically into groups of 100 users. This enhances the performance of your site because all users do not have to be displayed at once. These "display only" groups are not actual organizational groups defined for your site. They are named using the names of both the first and last users contained therein, as shown in the following image:

```
SkilSoft (SkillSoft)
  myGroup (org_5)
    [ myuser2000 - myuser2099 ]
    [ myuser2100 - myuser2199 ]
    [ myuser2200 - myuser2299 ]
```
- Deleting a user removes the user record from the database. Removing a user from a group simply removes the user from the group; the user is not deleted. Note that user must be a part of at least 1 organizational group.

- You cannot delete the original admin or administrator users in the root group.

- If the ILT add-on module is installed and enabled, users with ILT history cannot be deleted. If you wish to delete a user from the system, you can either remove their ILT records using the ILT module and then delete them, or simply deactivate the user instead of deleting them.

- If an Approval Manager is deleted, all users assigned to that account will be left without an Approval Manager. You should first assign those users to a new Approval Manager prior to deleting the original account. Run the Users Manager Report to locate all users assigned to the Approval Manager being deleted and assign those users to a new Approval Manager. You can then delete the original Approval Manager account.

- Only registered users are shown in the user tree in the User and Group Management interface.

- Users are either active (able to log in and access learning events) or inactive (unable to log in).
Find a Group
You can quickly search for a group that you need to view or modify.

To find a group
1. Click Users & Groups | User Management on the navigation bar.
   The User Management page appears, which includes search controls at the top.

2. To perform a basic search:
   a. For Search, select Group, and enter a group name or org code. You can also use an asterisk (*) as a wildcard that represents one or more characters.
   b. Click Search.

3. To perform an advanced search:
   a. Click the Advanced Search link in the upper-right corner.
   b. Use the additional fields provided to specify your search criteria.
   c. Click Search.

The search results are displayed on the Search Results tab in the left pane. You can click the org code for any group in the results to find the group’s location in the group hierarchy.
Assigning Content to Users and Groups

Inherited versus Explicit/Individual Assignments

Assignments control what content is available to groups and users. You can make the following types of content assignments:

- **Catalog Assignments**: These assignments determine what learning assets are exposed to users and groups in the CATALOG and using SEARCH&LEARN.

- **My Plan Assignments**: These assignments add learning assets to users' MY PLAN, which allows you or them to set goals, due dates, and reminders.

- **Enrollments and Waivers**: These assignments enroll users in learning programs. You can also grant waivers to individual courses within a program on a per user basis.

- **Books 24x7 Assignments**: These assignments determine what Books 24x7 collections are exposed to users and groups.

Groups can be assigned content by inheriting it due to their membership in their parent group; these assignments are referred to as *inherited assignments*. They can also be assigned content directly; these assignments are referred to as *explicit assignments*.

Similarly, individual users can be assigned content by inheriting it due to their membership in a group; these assignments are referred to as *inherited assignments*. They can also be assigned content directly; these assignments are referred to as *individual assignments*.
Inherited Assignments
By default, any content assigned to a group is inherited by all users in that group and by any child groups. This enables administrators to assign specific content to a large number of users. Users in multiple groups inherit the assignments of all the groups in which they are a member.

Explicit and Individual Assignments
In the case of Catalog assignments and Books 24x7 assignments, if you assign content to a group or user directly, that assignment overrides all inherited assignments.

In the case of My Plan assignments and enrollments, learners can only remove content that they have assigned to themselves directly.
Assets That Learners Can Restart

If your organization requires that learners repeat training at specified intervals (for example, every year to maintain a certification), your SkillPort site might be configured to support this requirement by allowing learners to "restart" some types of assets. If this is the case, after a learner completes the asset once, she can still launch it from the Completed tab in MY PROGRESS, as shown in the following image:

When a learner restarts a completed asset, she is prompted with the following question:

As the question indicates, she has 2 primary choices:

- **Restart**: This freezes the last completion record and creates a new record in MY PROGRESS that counts toward the next completion.

- **Continue**: This does not create a new record in MY PROGRESS. It allows the learner to re-enter the last completion with the goal of changing and improving its score. If the learner selects this option, she is returned to her previous bookmark, and the progress she makes is applied to her last completion.

Depending on the configuration of your site, learners may be able to restart/continue either or both of the following types of assets:

- **Courses Configured to Support Multiple Completions**: Typically, learners can complete a course only once. However, you may have the ability to configure selected courses to support multiple completions. If a course is configured to support this, learners can restart or continue the course from MY PROGRESS as described above.

While it is not required that MY PLAN assignments exist for courses that supports multiple completions, you (or learners) can create them if desired. Creating a MY PLAN assignment allows you to specify a goal and a due date. It also allows you to configure a reminder to be emailed to the learners.
• **Assets That Have Recurring MY PLAN Assignments:** If your site has been configured to support recurring MY PLAN assignments, you (and learners) can do so for the following types of assets: courses, test preps, SkillSims, custom content, practice labs, and recorded Dialogue sessions.

You create a recurring assignment by selecting the Recurrence check box and specifying a recurrence interval in the Add to My Plan dialog box, shown below:

![Add to My Plan dialog box]

**In My Progress,** learners work with assets with recurring MY PLAN assignments in the same manner that they do courses configured to support multiple completions. That is, when a learner launches the completed asset, she receives the same prompt to choose whether to restart or continue the asset.

However—if an asset has a recurring My Plan assignment—then a change also occurs in **MY PLAN.** After the first completion, the existing assignment is updated with a new due date that is set based on the date that the learner completed the asset and the assignment's specified recurrence time interval. For example, assume you add an asset to learner A's My Plan with a due date of December 31, 2008 and a recurrence interval of 1 year. Learner A then complete the asset on November 10, 2008. In learner A's MY PLAN, the existing assignment is automatically updated with a new due date November 10, 2009, that is, 1 year after the first completion date.
As you work with assets that can be "restarted," keep in the mind the following:

- The SkillSoft Course Manager (SCM) is an application that manages downloaded course content. Because the SCM is not aware of multiple progress records, learners cannot use it to complete any assets that they can restart.

- Each completion of an asset that can be restarted has its own record in reports.

- Your site might be configured to force learners to always restart the 2 types of assets described above. For more information, see the discussion on the Enable Forced Restart web site switch.

- While typically it is most convenient for learners to launch a completed asset from MY PROGRESS (since the page is quickly accessed and includes a Completed tab), if the asset can be restarted, learners can do so from anywhere they can launch it: MY PROGRESS, Credentialing MY PROGRESS, MY PLAN, the Catalog, or SEARCH&LEARN search results.

- Assets that can be restarted have special progress icons that are shown in MY PLAN. For more information, see the SkillPort Learner help.
## Assign or Deassign Curricula

Assigning curricula (including learning programs and Live Learning courses) to users and groups makes it available to those users in the CATALOG and using SEARCH&LEARN. You can assign curricula to:

- Groups
- Advanced groups
- Assignment groups
- Individual users

If you assign curricula to a group, it is inherited by all members of the group and all members of all child groups.

**Note:** Be aware that directly assigning curricula to a group or user overrides all inherited assignments from that group or user. For this reason, when you make direct assignments, be sure to assign all of the intended curricula. To restore the inherited assignments, you must manually remove all direct assignments.

You can also deassign curricula that you have directly assigned to a group or user. However, you cannot deassign inherited curricula. To remove inherited assignments, deassign the curricula from the group to which the curricula were directly assigned.

### To assign or deassign curricula to a group or user

1. Click **Users & Groups | User Management** on the navigation bar.

2. In the left panel, find the group or find the user whose assignments you want to modify, and select that group or user.
3. In the right panel, click the **Catalog Assignment** tab.

The curricula assigned to the selected user or group are displayed. As an example, the following image shows an individual user who inherits a set of assignments because she is a member of a group named SkillSoft.

![Catalog Assignment Tab Example](image)

4. If the assignments are inherited and you want to override them, do the following:
   a. Click **Override Inherited Assignment**.

   The Catalog Assigner appears, and the content that is available for assignment is displayed.

   ![Catalog Assigner](image)

   b. Browse or search the available curricula to find the curricula that you want to assign.
c. Select the asset that you want to assign. To select multiple assets, use the standard keyboard shortcuts (CTRL+click and SHIFT+click).

d. Click the Add arrow ( ) between the two panes.

e. Click Save.

5. If the assignments are explicit (directly assigned to the selected group) or individual (directly assigned to the selected user), and you want to remove one or more assignments, do one of the following:

   a. If necessary, return to the Catalog Assigner by clicking Edit Individual Assignments.

   b. To remove an assignment, move your mouse over the assignment, and click the Deassign link that appears, as shown in the following image.

   ![Deassign Link](image)

   c. Click OK.

**Note:** As previously mentioned, if you remove all explicit (direct) assignments from a group, the assignments inherited from the parent group are restored. Similarly, if you remove all individual (direct) assignments from a user, the assignments inherited due to membership in one or more groups are restored.
Use Case: Assign Custom Curricula to a Group

Administrators and managers can create custom curricula. Administrators can assign curricula to any group or user. However, managers can only assign curricula to groups and users below them in the group hierarchy.

Before creating custom curricula using the Catalog Manager, a super administrator must set up a location in which to add it; this location must be subordinate to the All Curricula folder. Depending on the needs of your organization, you can assign (expose) these areas to a group or to individual users. The use cases that follow illustrate two possible scenarios.

Use Case 1: Assign a Custom Curricula Area to a Group

1. You log in as an administrator, and you create a new user group called "Managers."

2. You add Manager1 and Manager2 to the new Managers group as shown in the following image.

   - All Users
   - Internal (Internal)
   - My Company (org_4)
   - Managers (org_5)
     - Manager1,Manager1 (manager1)
     - Manager2,Manager2 (manager2)
   - Users (org_6)
     - User1,User1 (user1)
     - User2,User2 (user2)
     - User3,User3 (user3)
     - User4,User4 (user4)
     - Manager1,Manager1 (manager1)
     - Manager2,Manager2 (manager2)
     - Manager3,Manager3 (manager3)
   - SkillSoft (SkillSoft)

As a result, Manager1 and Manager2 have multiple group assignments. Both must be a part of the My Company group if they are to assign curricula to the Users group or to its members individually. This is because managers can only assign curricula to managers and other users who are below them in the organizational hierarchy.

However, in order to create custom curricula, Manager1 and Manager2 must also be a part of the Managers group. This allows you to assign (expose) curricula to the Managers group that you do not expose to the Users group.
3. You use Catalog Manager to create a custom curricula area for managers. This is a folder that is referred to in the user interface as a curricula "group." Within the custom area, you also create separate areas for Manager1 and Manager2, as shown in the following image.

```
- All Curricula
  - KnowledgeCenter Custom Curricula
  - Unreleased Live Learning
  - SCORM 2004 Test Suite
  - SCORM 1.2 Test Courses
  - Unreleased Content Curriculum
  - Course Curricula
  - Learning Programs
  + Manager-Created Custom Curricula
    - Manager1 Custom
    - Manager2 Custom
```

4. You use the User & Group Management interface to assign the Manager-Created Custom Curricula folder to the Manager group. This has two effects in the Administrator tool:

   - It exposes the folder in Catalog Manager to all members of the Manager group (in this case, Manager1 and Manager2).
   - It exposes the folder on the Catalog Assignment tab of the User & Group Management interface, which means all members of the Manager group can assign its content (including the content in its subfolders) to users.
Use Case 2: Assign Custom Curricula to Individual Users

If privacy is a concern, you can use Catalog Manager to create a custom curricula folder under All Curricula for each individual manager and expose each folder to only the appropriate manager by assigning it to only that manager.

For example, building upon Use Case 1, the following image shows an additional custom curricula folder named Manager3 Custom. This folder lives outside of the Manager-Created Custom Curricula folder.

- All Curricula
  - Knowledge Center Custom Curricula
  - Unreleased Live Learning
  - SCORM 2004 Test Suite
  - SCORM 1.2 Test Courses
  - Unreleased Content Curriculum
  - Course Curricula
  - Learning Programs
    - Manager-Created Custom Curricula
      - Manager1 Custom
      - Manager2 Custom
      - Manager3 Custom

If you assigned the Manager3 Custom folder to just Manager3, the folder would be visible to only Manager3. As a result, while Manager1 and Manager2 could see the contents of each other’s custom curricula, they could not see the contents of Manager3’s custom curricula, nor could Manager3 see the contents of theirs.
Add or Remove Assets from Users’ MY PLAN

You can add and remove assets from MY PLAN for

- Individual users
- Groups
- Advanced groups
- Assignment groups

Add an Asset to Users’ MY PLAN

Adding learning assets to MY PLAN for a user or group allows you to set goals and due dates for those assets. Keep in mind the following as you do so:

- If you add an asset to MY PLAN for a group, all of the members of the group (and all members of all subgroups) inherit that asset in MY PLAN.

- If you add an asset to MY PLAN for a group or an individual, and one or more of those users have already added that asset themselves, the existing asset is simply moved to their Assigned folders. The users retain any progress they have made on the asset.

- If a user inherits an asset in MY PLAN but also has that same asset directly assigned to him or her, the asset appears twice in the user’s MY PLAN.

- Adding a learning program or Live Learning Course (LLC) to MY PLAN for a group or individual user does not automatically enroll the group or user. You must enroll the group or user as a separate, explicit action. Alternatively, each user can withdraw herself.

To add an asset to MY PLAN for a group or user

1. Click Users & Groups | User Management on the navigation bar.

2. In the left panel, find the group or find the user whose assignments you want to modify, and select that group or user.

3. In the right panel, click the My Plan Assignment tab.
Both the inherited MY PLAN assignments and the individual (if you have selected a user) or explicit (if you have selected a group) MY PLAN assignments for the user or group are displayed. As an example, the following image shows both the inherited and individual MY PLAN assignments for a selected user.

**Note:** While you can browse the inherited MY PLAN assignments for the user or group, to modify these you must modify the MY PLAN assignments of the parent group.

4. Do one of the following:

   - If you have selected a user, click **Edit Individual Assignments**.
   - If you have selected a group, click **Edit Group Assignments**.
Users & Groups

The My Plan Assigner page appears.

5. Browse or search the Catalog to find the learning asset that you want to add, and select it.

6. Click the Assign arrow (→) between the two panes.
The Add to My Plan dialog box appears. Note that, depending on the configuration of your site, one or more of the settings shown in the image below might not be available.

7. If desired, for **Goal**, enter a phrase that describes the goal for completing the asset.
8. For **Due date**, select:

- **Fixed date** to enter a definitive due date as to when the user must complete the asset.
- **Period after assignment** to specify the exact number of days, once the asset is assigned, to complete the asset.

**Note:** If you select this option for an asset that you are assigning to a group, be aware that users who are added to the group at a later date will inherit the My Plan assignment when they are added to the group, but they **will not** have the same due date as that for existing members. Their due date will be relative to the date on which they were assigned the asset, which is the date they were added to the group.

For example, assume you add Asset A to My Plan for all members of Group X on January 1, 2009; you also specify the asset is due 3 months after you assign it, which means it is due April 1, 2009. On February 1, 2009, you add John to Group X. Because John is assigned Asset A one month later (when he is added to the group), his due date for Asset A is also one month later, that is, May 1, 2009.

9. If desired, select the **Recurrence** check box to indicate that the learning asset must be repeated at a specific interval (that is, it should be treated like an asset that can be "restarted"). Then enter a number, and select the type of time interval to use (Days, Weeks, Months, or Years).

**Note:** Recurrence is not available for Books or Book sections.

10. For **Reminder**, select one of the following:

- **Allow users to set their own reminders**
- **Set your reminder**: Select the frequency from the drop-down list and enter a number of days, weeks or months prior to the due date to send the reminder. (For example, a Daily reminder set for 5 Days before the due date.)

**Note:** If you set a reminder, users cannot change it. Moreover, if you allow users to set their own reminders, you can override them with a reminder that you set.

11. For **Overdue notices**, select one of the following:

- **Allow users to choose their own overdue notices**
- **Send weekly overdue notices**: The system sends an email the day after the due date and every 7 days thereafter until the user completes the course. Note that the Overdue notices setting is only available if you are assigning an **individual course** to MY PLAN (and for no other type of asset). It is not available if you are adding a curriculum folder of courses from the CATALOG since the folder will contain multiple courses that may be in varying stages of completion.
Note: If the asset is a *course*, for **Overdue notices**, select that users can choose whether to receive overdue notices by email, or select that overdue notices should be sent (and users should not be given the choice).

12. If completion of the asset is required, select the **Required** check box. This setting has no impact on the system's behavior. It is an attribute that displays in generated reports.

13. Click **OK**.

14. Click **Save**.
Managing Development Plans

Development Plans

What is the Development Plan folder?
The Development Plan folder is an area where both the learner and manager can collaboratively develop an approved, personalized development designed to achieve specific career development goals and keep track of assets.

Development Plan Approval State
The learner and his or her manager can add learning assets to the Development Plan. When the learner's manager adds an asset to the Development Plan folder, there is no submission required and the folder displays as Approved. Whenever the learner makes a change to the folder, it enters a Pending state and stays in that state until:

- the learner submits the Development Plan for approval and the manager approves the assets. The Development Plan folder displays as Approved.
- the learner removes the new assets. The Development Plan folder reverts back to the state it was in prior to any changes.
Approve or Deny a Development Plan
When a user adds an asset to the Development Plan folder, the folder is in a Pending state. The user can then click Approve to send the folder contents to the Approval Manager for review and approval or denial.

To review, approve or deny a Development Plan request

1. Log into SkillPort.

2. Click Approval Manager in the top right corner. The Approval Manager page displays:

![Approval Manager](image)

3. Optionally, you can review the Development Plan request:
   a. Click 📝. The Development Plan Request window displays.
   b. If applicable, enter any notes to the user.
   c. Do one of the following:
      ▪ Click Approve to approve the folder.
      ▪ Click Deny to deny the request. The user must remove the asset(s) you denied.
      ▪ Click Cancel to close the Development Plan Request window without approving or denying the request.

4. Alternatively, you can use the Actions icons to quickly approve or deny the request:
   ▪ Click ✔️ to approve the Development Plan request. When the Are you sure you want to approve the request? message displays, click OK.
   ▪ Click ❌ to deny the Development Plan request. When the Are you sure you want to deny the request? message displays, click OK.
Assign an Asset to Users’ Development Plan Folders

To add a learning asset to the Development Plan

1. In SkillPort, click Admin at the top right of the page. The SkillPort Administrator home page displays.

2. Click Assign learning resources to a user or group. The User Management page displays.

3. In the Users and Groups pane, navigate to the user whose Development Plan you want to modify.

4. In the right pane, click the Dev Plan Assignment tab.

5. Click Edit Individual Assignments. The Development Plan Assigner dialog displays:

6. Find a learning asset by browsing the CATALOG or by searching for a word or phrase using SEARCH&LEARN™.

7. Click the asset you want to add to the user's MY PLAN.
8. Click . The Add to Development Plan dialog displays:

![Add to Development Plan dialog]

9. Enter a **Goal** that describes the objective you want the user to achieve from the learning asset.

10. If applicable, select a **Due Date** from the calendar.

11. If applicable, set a **Reminder** to have a one-time or recurring email sent to the user automatically.

   **Note:** If you set a reminder, you must also enter the number of days before the asset's due date to send the initial or one-time reminder email. The reminder email contains direct links to the asset itself and to its summary page.

12. If applicable, select **Required**.

   **Note:** This setting does not affect the behavior of application; it is used for reporting. It differentiates required assets from optional ones.
13. Optionally, select **Overdue notices** to send weekly email reminders if the asset is not completed by the specified Due Date.

14. Click **OK**. The asset displays in the user's Development Plan folder in MY PLAN and is automatically in an approved state.
Enroll or Withdraw a Group or User from Learning Programs

The topics in this section describe how to enroll and withdraw a group or user from learning programs using the User & Group Management user interface. Note that you can also do so using the Manage Enrollments and Waivers user interface.

Enroll a Group or User in a Learning Program

When you enroll users or groups in a learning program or Live Learning course (LLC), keep in mind the following:

- You can enroll a user both individually and by enrolling a group in which he or she is a member. These enrollments are treated independently; that is, if later you withdraw one, the other is unaffected.

- If you remove a user from a group, the user is automatically withdrawn from a group enrollment as long as he or she has not completed the learning program or LLC. (The completion data for all users who have completed learning programs or LLCs always remains in the system.)

- If you enroll a group, and later you add more users or more subgroups to the group, the newly added users or subgroups are automatically enrolled as well.

  The exception to the aforementioned is if you add a new subgroup directly beneath the All Users group. You can enroll the All Users group in order to enroll all of your users in a specific program or course. However, if you later add a new subgroup to the All Users group, you must explicitly enroll the new subgroup (or withdraw the All Users group and enroll it again). Note that the All Users group is not displayed if you are not an administrator with a Company Administrator role.

- Enrolling in a learning program or LLC (or a learner's request to enroll) is considered the first step of "starting" the program or course; as a result, these assets are automatically shown in a learner's My Progress once you enroll him or her.

- If a learning program is used in a KnowledgeCenter roadmap, learners must be assigned and enrolled in the learning program before they can see it in the KnowledgeCenter. If they are not assigned, they will see an error message. If they are assigned but not enrolled, the learning program will appear empty in the KnowledgeCenter roadmap details page.

To enroll a group or user in a learning program

1. Click Users & Groups | User Management on the navigation bar.

2. In the left panel, find the group or find the user that you want to enroll in a learning program, and select that group or user.

3. In the right pane, click the Enrollments and Waivers tab.
Both inherited enrollments and individual (if you have selected a user) or explicit (if you have selected a group) enrollments for the user or group are displayed. As an example, the following image shows the inherited and individual enrollments for a selected user.

4. Click **Edit Individual Enrollments** (if you have selected a user) or **Edit Group Enrollments** (if you have selected a group).

5. Browse or search the available curricula, and find the learning program in which you want to enroll the group or user.

6. Select the learning program, and then click the Enroll arrow (→).
7. In the **Confirm** dialog, if you do not want to create a corresponding My Plan assignment for the user or group, click **No**. Otherwise, click **Yes**, and do the following:

   a. Enter the information as appropriate (see *Add or Remove Assets from Users’ MY PLAN* on page 23).

      Note that if you specify a relative due date for a learning asset that you are assigning to a *group*, be aware that users who are added to the group *at a later date* will inherit the My Plan assignment when they are added to the group, but they will not have the same due date. Their due date will be relative to the date on which they were assigned the asset, which is the date on which they were added to the group.

      For example, assume you add Asset A to My Plan for all members of Group X on January 1, 2009; you also specify the asset is due 3 months after you assign it, which means it is due April 1, 2009. On February 1, 2009, you add John to Group X. Because John is assigned Asset A one month later (when he is added to the group), his due date for Asset A is also one month later, that is, May 1, 2009.

   b. If available, and if you want to send a notification email to the learner or group, select the **Send Email to Enrollee(s)** check box.

   c. Click **OK**.

8. If you select No for step 7, in the subsequent **Confirm** dialog (if available), click **Yes** if you want to send a notification email to the learner or group. Otherwise, click **No**.

9. Click **Save**, and then click **OK**.

**Withdraw a Group or User from a Learning Program**

When you withdraw users or groups from a learning program or LLC, keep in mind the following:

- A user can be enrolled in a program or course both individually and due to membership in a group that is enrolled. These enrollments are treated independently; that is, if you withdraw one, the other is unaffected.

- You cannot withdraw users who have completed the program or course. The completion data for all users who have completed learning programs or LLCs always remains in My Progress for those users (unless you delete the learning program).

- You cannot withdraw an individual user from a group enrollment.
If you remove a user from a group, the user is automatically withdrawn from a group enrollment as long as he or she has not completed the program or course.

If your site is configured to use enrollment-related notification emails:

- When you individually withdraw users from a learning program, the users are automatically sent a notification email.
- When you withdraw groups, you are prompted to specify whether to send a notification email.

To withdraw a group or user from a learning program

1. Click **Users & Groups | User Management** on the navigation bar.

2. In the left panel, find the group or find the user that you want to withdraw from a learning program, and select that group or user.

3. In the right panel, click the **Enrollments and Waivers** tab.

Both inherited enrollments and individual (if you have selected a user) or explicit (if you have selected a group) enrollments for the user or group are displayed. As an example, the following image shows the inherited and individual enrollments for a selected user.
4. Click **Edit Individual Enrollments** (if you have selected a user) or **Edit Group Enrollments** (if you have selected a group).

5. In the right pane, select the learning program, and click **Withdraw**.

6. In the Confirm dialog, click **OK**.

7. In the Withdraw dialog (if available), if you want to send a notification email to the learner or group, click **Yes**. Otherwise, click **No**.

8. Click **Save**, and then click **OK**.
Users & Groups

Enrollments and Waivers

View Current Enrollments

To view the current enrollments for a learning program or Live Learning course (LLC)

1. Click Users & Groups | Enrollments and Waivers on the navigation bar.

   The Manage Enrollments and Waivers page appears, which lists all of the learning programs and Live Learning courses available on your site. To view the details of a program or course, click (plus sign). To sort on a specific column, select it. To change the sort order, select it again.

2. Select the learning program or Live Learning course for which you want to view current enrollments, and click Manage Enrollments at the top of the page.

   The Manage Enrollments page for the selected program or course appears. The left pane shows all of the available, active users and groups (so you can easily add them to the learning program if needed). By default, the right pane shows the Groups tab as active, which lists the groups that are currently enrolled. Be aware that while subgroups of a group are not shown, they are implicitly enrolled in the program or course as well.

   A ✓ under the My Plan column for a group indicates that the members of the group have an administrator-created My Plan entry for the given learning program or course.

3. If you want to view the list of users who are enrolled individually (either by themselves or by an administrator) instead of due to membership in a group that is enrolled, click the Users tab.
4. If desired, you can also modify the presentation of the data in the Current Enrollments pane:

- To sort the users or groups using a different attribute, click the corresponding column header. You can also change the sort order (ascending or descending) by clicking the column header again or by clicking the down arrow and selecting Ascending or Descending from the context menu that appears.

**Note:** Many of the columns on the Current Enrollments pane allow you to apply a filter, so that only the groups or users that meet the filtering criterion are displayed. For example, on the Users tab, you can apply a filter to the Status column so that only users with a particular status are shown.

- To apply a filter to a column, click the \( \downarrow \) (down arrow) on the right end of the column header, select **Filters**, and then apply the filter. If it is a text filter, enter the text string that all items must match exactly, and press **Enter**. Text filters are not case-sensitive, and they do not support wildcards (*). If it is a multi-select filter, such as that for Status, select the appropriate check boxes, and press **Enter**. You can apply filters to multiple columns.

You can easily determine if a column has a filter applied because its header is displayed in bold and italics, as shown below.
Users & Groups

Enroll Users or Groups

When you enroll users or groups in a learning program or Live Learning course (LLC), keep in mind the following:

- You can enroll a user both individually and by enrolling a group in which he or she is a member. These enrollments are treated independently; that is, if later you withdraw one, the other is unaffected.

- If you remove a user from a group, the user is automatically withdrawn from a group enrollment as long as he or she has not completed the learning program or LLC. (The completion data for all users who have completed learning programs or LLCs always remains in the system.)

- If you enroll a group, and later you add more users or more subgroups to the group, the newly added users or subgroups are automatically enrolled as well.

The exception to the aforementioned is if you add a new subgroup directly beneath the All Users group. You can enroll the All Users group in order to enroll all of your users in a specific program or course. However, if you later add a new subgroup to the All Users group, you must explicitly enroll the new subgroup (or withdraw the All Users group and enroll it again). Note that the All Users group is not displayed if you are not an administrator with a Company Administrator role.

- Enrolling in a learning program or LLC (or a learner's request to enroll) is considered the first step of "starting" the program or course; as a result, these assets are automatically shown in a learner's My Progress once you enroll him or her.

- If a learning program is used in a KnowledgeCenter roadmap, learners must be assigned and enrolled in the learning program before they can see it in the KnowledgeCenter. If they are not assigned, they will see an error message. If they are assigned but not enrolled, the learning program will appear empty in the KnowledgeCenter roadmap details page.
To enroll users or groups in a learning program or LLC

1. Click **Users & Groups | Enrollments and Waivers** on the navigation bar.

2. Select the learning program or Live Learning course in which you want to enroll users or groups, and click **Manage Enrollments**.

   The Manage Enrollments page appears.

3. In the Users and Groups pane on the left, locate the users or groups that you want to enroll. You can do this in one of two ways:
   - Browse the hierarchy of groups and users.
   - Search for the groups or users using the search controls at the top of the page. If you are searching for a group, you can enter a group name or org code. If you are searching for users, you can enter a login name, first name, last name, or email address. You can also use an asterisk (*) as a wildcard that represents one or more characters.

4. Select the users or groups that you want to enroll, drag them to the Current Enrollments pane, and drop them on the pane. To select multiple users or groups, use Shift-click and Ctrl-click.

   Alternatively, you can select the users or groups, and then click beneath the two panes.

   The users or groups are enrolled in the learning program or LLC.

5. If prompted (because your site is configured to use enrollment-related notification emails), click **Yes** if you want to send a related email notification to the users or groups. If you do not, click **No**.

6. If desired, create an entry in MY PLAN for the users or groups that you enrolled:
   - In the Current Enrollments pane, select the users or groups. (Use Shift-click or Ctrl-click to select multiple users or groups.)
   - Click **Configure My Plan** at the top of the pane.
c. In the Editing My Plan dialog, enter the information as appropriate (see Add or Remove Assets from Users' MY PLAN on page 23).

Note that if you specify a relative due date for a learning asset that you are assigning to a group, be aware that users who are added to the group at a later date will inherit the My Plan assignment when they are added to the group, but they will not have the same due date. Their due date will be relative to the date on which they were assigned the asset, which is the date on which they were added to the group.

For example, assume you add Asset A to My Plan for all members of Group X on January 1, 2009; you also specify the asset is due 3 months after you assign it, which means it is due April 1, 2009. On February 1, 2009, you add John to Group X. Because John is assigned Asset A one month later (when he is added to the group), his due date for Asset A is also one month later, that is, May 1, 2009.

d. Click OK.

**Note:** If a user has an existing administrator-assigned My Plan entry for the asset, this step updates the entry; it does not create a new one. In addition, be aware that you can modify this My Plan entry later by returning to this page and repeating this step.

An ✔ icon is displayed in the My Plan column for the selected users or groups to indicate that they have a corresponding My Plan entry.

### Approve Pending Users

If you have been selected as an approval manager for learners, you must approve the enrollment of those learners in all learning programs that have been configured to require manager approval.

#### To approve the enrollment of learners in a learning program

1. Click Users & Groups | Enrollments and Waivers on the navigation bar.

2. Select the learning program from the list of available learning programs, and click Manage Enrollments.

3. Click the Users tab in the Current Enrollments pane on the right.

4. On the Users tab, select the users whose enrollments are in Pending Approval status. To select multiple users, use Shift-click or Ctrl-click.

**Note:** You can also filter the list of users shown to include only those whose status is Pending Approval. For more information, see View Current Enrollments on page 39.

5. Click Approve Pending.
Withdraw Users or Groups

When you withdraw users or groups from a learning program or LLC, keep in mind the following:

- A user can be enrolled in a program or course both individually and due to membership in a group that is enrolled. These enrollments are treated independently; that is, if you withdraw one, the other is unaffected.

- You cannot withdraw users who have completed the program or course. The completion data for all users who have completed learning programs or LLCs always remains in My Progress for those users (unless you delete the learning program).

- You cannot withdraw an individual user from a group enrollment.

- If you remove a user from a group, the user is automatically withdrawn from a group enrollment as long as he or she has not completed the program or course.

- If your site is configured to use enrollment-related notification emails:
  - When you individually withdraw users from a learning program, the users are automatically sent a notification email.
  - When you withdraw groups, you are prompted to specify whether to send a notification email.

To withdraw users or groups from a learning program

1. Click **Users & Groups | Enrollments and Waivers** on the navigation bar.

2. Select the learning program from the list, and click **Manage Enrollments**.

3. If you want to withdraw individual users, click the **Users** tab in the Current Enrollments pane on the right. Otherwise, leave the **Groups** tab active.

4. In the Current Enrollments pane on the right, select the users or groups that you want to withdraw. To select multiple users or groups, use Shift-click or Ctrl-click.

5. Click **Withdraw** at the top of the pane, and then click **Yes** to confirm the withdrawal.

6. If prompted, click **Yes** if you want to send an email notification to the members of the group. If you do not, click **No**.

   The learning program is removed from My Progress for all affected users.

At this point, you might also want to remove any corresponding entries in the users' My Plan. You can remove My Plan entries using the My Plan Assignment tab in the User and Group Management interface. For more information, see **Adding and Removing Curricula from Users' MY PLAN** on page 23.
Send an Email

You can use SkillPort to send an email to a combination of individual users and group members.

Because this feature is intended for one-way communication—for example, a broadcast announcement about the availability of a new course—you are not identified as the sender, nor is your email address used to send the email. Rather, a generic, unmonitored "sender" email address that has been defined for your SkillPort site is used. As a result, recipients cannot respond directly to you, nor are their replies viewed.

An email sent through the SkillPort system is not stored within SkillPort for accessing at a later date. As an alternative, include yourself as one of the recipients so you receive and can retain a copy in your default email application.

**Note:** Do not use this feature for time-sensitive communications. For guidelines on how to test email delivery, contact your Learning Consultant or Application Engineer at SkillSoft. SkillSoft does not accept liability for non-delivery of emails due to circumstances beyond its control, such as a local network outage.

To send an email

1. Click Users & Groups | Send Email on the navigation bar.

2. Specify the users to whom to send the email:
   a. Click the To button.

   The Email To window appears. In the left pane, the users and groups that you have the access privileges to view are displayed.

   b. To add users to the recipient list, select the users and/or groups in the left pane, and click Add. Alternatively, you can drag the selection to the right pane, and drop it.
Users & Groups

If needed, you can use the controls at the top of the page to search for a group by group name or org code, or to search for a user by login name, first name, last name, or email address. In either case, you can use an asterisk (*) as a wildcard that represents one or more characters.

You cannot enter email addresses manually; you must select the users and groups from the group hierarchy. Also note that the system does not allow you to add individual users who do not have defined email addresses; these users are highlighted in red.

If you add a group to the recipient list, both the members of the selected group and those in its subgroups will receive the email (if they have defined email addresses).

c. To remove users or groups from the email, select the users or groups in the right pane, and click Remove.

d. Click OK.

3. Enter a subject in the Subject text field.

4. Enter the message in the Body text box.

The message can include a combination of plain text, symbols (accessible via the $2 button), fields, hyperlinks, and images. When the email is sent, the fields are replaced with the appropriate information if it is available in the system. For example, the {User First Name} field is replaced with the user's first name in his or her profile.

The following image serves as an example.

5. To insert a field:
   a. Put the cursor in the desired location.
   b. Select the field from the drop-down list on the toolbar.
c. Click 

(To remove a field, select it, and click X.)

6. To add a hyperlink:
   a. Select the text to convert to a hyperlink, and click 

      The Insert/edit link dialog box appears.
   b. For **Link URL**, enter the URL. This value is required. The URL must be complete and, therefore, must begin with the following:
      
      http://
   c. For **Target**, specify whether the URL should be launched in a new browser window or the existing browser window. If you do not specify a value, the link is launched in a new window.
   d. For **Title**, enter a short description to display as a “tool tip” when the user moves the cursor over the link.

      **Note:** You do not have to configure the **Class** setting. It is not used.
   e. Click **Insert**.

      (To remove a link, place the cursor inside it, and click X.)
7. To add an image:

   a. Put the cursor in the desired location, and click ✉️.

      The Insert/edit image dialog box appears.

   b. For **Image URL**, enter the complete URL for the location of the image. The image must be a JPEG or GIF file that is hosted on a web site elsewhere. In the recipient's email, the URL will render as a link that, if clicked, will render the image itself. This value is required.

   c. For **Image description**, enter a description of the image. In text-only environments (browsers that cannot display inline images), this text is displayed instead of the image. This value is required.

   d. For **Alignment**, select how to align the image relative to the line of text in which it is inserted. For example, select "Left" to align the image with the left margin and have the text wrap around the image's right side.

   e. For **Dimensions**, enter in pixels the size (width x height) of the image if you want it to be resized before being inserted into the email.

   f. For **Border**, enter in pixels the width of the border to add around the image.

   g. For **Vertical space**, enter in pixels the width of the padding to add before and after the image.

   h. For **Horizontal space**, enter in pixels the width of the padding to add to the left and right of the image.

   i. Click **Insert**.

8. Format the text using the controls provided for bold, italics, and so on.

   **Note:** The system does not permit you to format a selection of text that includes a field. To apply the formatting, first format the selection of text (without the field), and then insert the field. This applies the formatting to both the text and the field.
9. Click **Send**, and then click **OK** to confirm the action.

The email is sent immediately, although note that—based on the number of recipients and other email jobs that are being processed—it can take some time for the recipients to actually receive it.

After the email has been sent, you are notified directly via a separate email that this is the case. The email text is as follows:

Subject:
Email Sent

Body:
Your email "<the subject you specified in your email>" has been sent.
The following users do not have email addresses configured and did not receive your email:
<user A's last name>,<user A's first name>
<user B's last name>,<user B's first name>
In This Chapter

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Catalogs

In the SkillPort Catalog that is displayed to learners, an individual curriculum consists of learning assets that satisfy a specific course of study. Curricula are displayed in an expandable tree hierarchy, organized into folders in the Catalog. A folder can contain any number of child folders and learning assets.

As a SkillPort user with an administrator or manager role, you can use the Catalog Manager to modify the Catalog by adding content and reorganizing its structure.

The Catalog Manager has three main areas:

- **Search panel**: Use this panel at the top to specify the search criteria when you search for folders and assets. (For more information on this search tool, see Search for Assets and Folders.)

- **View Contents pane**: Use this left pane to browse the Catalog in its current state or to browse the results of a search. For convenience, you can also use this pane to quickly rename or remove custom folders.

- **Edit Contents pane**: Use this right pane to edit the contents of a folder, that is, to add or remove learning assets; to create, rename, remove, or reorganize the contents a folder; or to create, edit, or delete an external learning object (ELO).

**Note**: A user cannot see any stock or custom content in the Catalog until you assign it to him or her directly or to a group of which he or she is a member. To access the interface with which to assign content to groups and individual users, click **Users & Groups | User Management** on the navigation bar.
Browse the Catalog

To browse the Catalog

1. Click **Content | Catalog** on the navigation bar.

The Catalog Manager appears, which displays all installed, activated content.

The Catalog Manager is divided into two resizable panes. You use the left pane to browse the Catalog in its current state or to browse the results of a search (Search Results tab not shown); for convenience, you can also use this pane to quickly rename or remove custom folders. You use the right pane to edit the contents of a folder, that is, to add or remove learning assets; to create, rename, remove, or reorganize the contents a folder; or to create, edit, or delete an external learning object (ELO).

2. Browse the contents of the Catalog and examine its structure by expanding and collapsing the folders in the left pane.

**Note:** Folders whose contents cannot be modified are shown with a locked icon (🔒).
### Search the Catalog

**To search the Catalog**

1. Click **Content | Catalog** on the navigation bar.

   The Catalog Manager appears, which displays all installed, activated content.

   The Catalog Manager is divided into two resizable panes. You use the left pane to browse the Catalog in its current state or to browse the results of a search; for convenience, you can also use this pane to quickly rename or remove custom folders. You use the right pane to edit the contents of a folder, that is, to add or remove learning assets; to create, rename, remove, or reorganize the contents a folder; or to create, edit, or delete an external learning object (ELO).

2. At the top of the page, enter your search criteria, and click **Search**.

   **Note:** For detailed information on the search tool, including tips on creating search expressions, see Search for Assets and Folders.
Both the folders and assets that meet the criteria that you specified are displayed on the Search Results tab in the left pane, as shown below in an example search for the term "java".

3. From this point you can do the following:

- Click a category link at the top of the results to filter the search results to show only that type of asset.

- To view more search results for a given category, click the View More link (shown above) for that category. Note that, depending on the number of items returned and how the search settings for your site are configured, there may be multiple pages of search results.

- To view more information about an asset, move your mouse over the asset title, and then click the Show Details link that appears.
If you want to identify the location of the asset in the Catalog, you can then click **View in Catalog** (shown below); this returns you to the Browse Catalog tab with the Catalog opened to the location of the asset (and with the asset selected so you can easily add it to a folder in the Edit Contents pane using drag-and-drop).

![View in Catalog](image)

**Note:** In the Catalog view, folders whose contents cannot be modified are shown with a locked icon (🔒).
Create a Folder

You can create a custom folder in any folder whose contents can be modified. If a folder's contents cannot be modified, the folder is shown with a locked icon (🔒).

To create a custom folder

1. Click Content | Catalog on the navigation bar.

   The Catalog Manager appears.

2. In the Browse Catalog pane, browse to or search for the folder in which to create the custom folder.

3. Move your mouse over the folder title, and click the Edit Contents link that appears, as shown below.

   ![Edit Contents](image)

   (The Edit Contents link appears beside only folders whose contents can be modified.)

   The contents of the Edit Contents pane on the right are now filtered to display only the affected folder.

4. In the Edit Contents pane, select the folder, and then click New Folder in the upper-right corner of the pane.

5. In the New Folder dialog box, enter a name for the new folder.

   The folder name can be greater than or equal to 100 characters, and all alphanumeric and special characters that you can enter using the keyboard are permitted except for double-quotes (""") and the backslash (\). In addition, the name must be unique with respect to all other folders in the same location in the Catalog. However, case-sensitivity is considered when determining uniqueness; for example, "Sample Curricula" and "Sample curricula" are considered two unique names.

6. Click OK.

   The folder is created, and you can now populate it with subfolders and assets as needed. Empty folders do not appear in the Catalog. For more information, see Copy Folders and Assets into Other Folders on page 58.

Note: After you are done making changes to the Catalog, you must click Exit to exit the Catalog Manager. Clicking Exit updates the Catalog to reflect your changes.
Rename a Folder

You can rename a custom folder, but you cannot rename a folder provided with the stock Catalog.

To rename a custom folder

1. Click Content | Catalog on the navigation bar.
   The Catalog Manager appears.
2. In the Browse Catalog pane, browse to or search for the custom folder that you want to rename.
3. Move your mouse over the folder title, and click the Rename link that appears, as shown below.
   (The Rename link appears beside only folders that you are allowed to rename.)
4. In the Rename Folder dialog box, enter a name for the folder.
   The folder name can be greater than or equal to 100 characters, and all alphanumeric and special characters that you can enter using the keyboard are permitted except for double-quotes ("")) and the backslash (\). In addition, the name must be unique with respect to all other folders in the same location in the Catalog. However, case-sensitivity is considered when determining uniqueness; for example, "Sample Curricula" and "Sample curricula" are considered two unique names.
5. Click OK.

Note: After you are done making changes to the Catalog, you must click Exit to exit the Catalog Manager. Clicking Exit updates the Catalog to reflect your changes.
Copy Folders and Assets into Other Folders

You can copy existing folders and assets into any other folder whose contents can be modified. If a folder’s contents cannot be modified, the folder is shown with a locked icon (🔒). Folders from the stock SkillSoft Catalog are locked.

While you cannot modify the folders in the stock Catalog, you can copy their contents into custom folders, which you can then modify by removing and reorganizing the copies.

Note: If you make a copy of a folder from the stock SkillSoft catalog, the copy will no longer be kept in sync with additions or removals that occur to the stock catalog folder. If new courses are added to or courses are removed from the stock catalog folder, the changes will not be applied to the copy of the folder. Those changes will need to be done manually to the copied folder. Course updates, however, are applied throughout the system, including custom folders.

To copy folders and assets into a folder

1. Click Content | Catalog on the navigation bar.
   The Catalog Manager appears.

2. In the Browse Catalog pane, browse to or search for the folder into which you want to copy one or more folders or assets.

3. Move your mouse over the folder title, and click the Edit Contents link that appears, as shown below.

   ![Course Curricula](course_curricula.png)
   ![Learning Programs](learning_programs.png)
   ![My Sample Folder](my_sample_folder.png)

   (The Edit Contents link appears beside only folders whose contents can be modified.)

   The contents of the Edit Contents pane on the right are now filtered to display only the affected folder.

4. Still in the Browse Catalog pane, browse to or search for the folders or assets that you want to copy, and then select them.

   Note: To select multiple folders or assets, use Shift-click or Ctrl-click. Also note that you can select a combination of folders and assets, not just one or the other.

5. Drag the selected folders and assets in the left pane to the desired destination in the Edit Contents pane on the right, and drop them. (If you move your mouse over a collapsed subfolder, it will automatically expand to allow you to drop the assets inside.)

   Alternatively, you can copy the assets by selecting them in the left pane, selecting a single destination folder in the right pane, and then clicking .

   The folders and assets are copied to the destination folder.
**Note:** After you are done making changes to the Catalog, you must click **Exit** to exit the Catalog Manager. Clicking **Exit** updates the Catalog to reflect your changes.

**Reorder Folders and Assets**

You can reorder the folders and learning assets in any folder whose contents can be modified. If a folder’s contents cannot be modified, the folder is shown with a locked icon (🔒).

**To reorder the folders and assets in a folder**

1. Click **Content | Catalog** on the navigation bar.

   The Catalog Manager appears.

2. In the Browse Catalog pane, browse to or search for the folder in which you want to reorder subfolder and assets.

3. Move your mouse over the folder title, and click the **Edit Contents** link that appears, as shown below.

   ![Edit Contents Link](image)

   (The Edit Contents link appears beside only folders whose contents can be modified.)

   The contents of the Edit Contents pane on the right are now filtered to display only the affected folder.

4. In the Edit Contents pane, select the folder or asset that you want to move, drag it to a new location inside of the folder, and drop it.

**Note:** After you are done making changes to the Catalog, you must click **Exit** to exit the Catalog Manager. Clicking **Exit** updates the Catalog to reflect your changes.
Content

Remove Content from a Folder

You can remove content from any folder whose contents can be modified. If a folder’s contents cannot be modified, the folder is shown with a locked icon (🔒). Folders from the stock SkillSoft Catalog are locked.

You can remove the following types of content:

- An instance of an asset from the stock Catalog that you have copied into a custom folder. Removing the copy does not affect the original asset in the stock Catalog.

- A custom asset in a custom folder. If this is the only instance of the asset in the Catalog, this removes the asset from both the Catalog and the Catalog Manager view. However, it does not permanently delete the asset from your site; the asset remains in an ACTIVE state in the Content Installer. This is the case regardless of how the custom content was initially installed (Content Installer or SkillSoft Publisher). To permanently remove custom content, contact your SkillSoft account team representative for assistance.

To remove content from a folder

1. Click Content | Catalog on the navigation bar.
   The Catalog Manager appears.

2. In the Browse Catalog pane, browse to or search for the folder that contains the learning asset that you want to remove.

3. Move your mouse over the folder title, and click the Edit Contents link that appears, as shown below.

   ![Edit Contents link](image)

   (The Edit Contents link appears beside only folders whose contents can be modified.)

   The contents of the Edit Contents pane on the right are now filtered to display only the affected folder.

4. Move your mouse over the asset title, and click the Remove link that appears, as shown below.

   ![Remove action](image)

5. Click OK to confirm the removal.

   **Note:** After you are done making changes to the Catalog, you must click Exit to exit the Catalog Manager. Clicking Exit updates the Catalog to reflect your changes.
Remove a Folder

You can permanently remove a custom folder, but you cannot remove a folder provided with the stock Catalog.

Removing a custom folder from the Catalog also permanently removes all of the child folders and learning assets in the folder. If the folder’s contents include custom assets that are not located elsewhere in the Catalog, this permanently removes them from the site. For this reason, before removing a folder, carefully examine its contents and, if necessary, copy any custom assets to a different folder.

To remove a custom folder

1. Click Content | Catalog on the navigation panel on the left.

   The Catalog Manager appears.

2. In the Browse Catalog pane, browse to or search for the custom folder that you want to remove.

3. Move your mouse over the folder title, and click the Remove link that appears, as shown below.

   (The Remove link appears beside only folders that you are allowed to remove.)

4. In the pop-up dialog box, click OK to confirm the removal.

   **Note:** After you are done making changes to the Catalog, you must click Exit to exit the Catalog Manager. Clicking Exit updates the Catalog to reflect your changes.
Working with External Learning Objects (ELOs)

Create an ELO
An external learning object (ELO) is a reference to a learning activity or resource such as

- A membership in a professional association
- A subscription to (or an article in) a journal or magazine
- An on-the-job or off-the-job experience
- A web site (for example, http://www.mywebsite.com/usefulinfo.html)
- An Internet newsgroup

External learning objects can be displayed in the Catalog and searched for using SEARCH&LEARN. However, SkillPort cannot track their completion by learners.

To create an ELO

1. Click Content | Catalog on the navigation bar.
   The Catalog Manager appears.
2. In the Browse Catalog pane, browse to or search for the folder in which to create the external learning object.

   **Note:** You can add an external learning object to any folder that can be modified except for the top-level Catalog folder.

3. Move your mouse over the folder title, and click the Edit Contents link that appears, as shown below.

4. In the Edit Contents pane, select the folder, and then click New ELO in the upper-right corner of the pane.
5. In the **Create New External Learning Object (ELO)** dialog box, enter the information for the new ELO (Required fields are indicated with an asterisk (*).):

   a. For **Title**, enter a title.

   b. For **Valid URL**, enter the URL at which learners can access the ELO.

   **Note:** The URL must be static (no passing of parameters or variables is permitted), and it must begin with http:// or https://. In addition, if the resource to which the URL points is hosted by SkillSoft, the URL must point to either a PDF file or an HTML page that does not include scripting. Microsoft Office documents—including those converted to HTML—are **not** permitted. If you want to point to a resource whose file type is not permitted, you must host it on an external server (that is, specify an external URL).

   c. For **ID**, enter a unique identifier. As shown in the dialog box, the identifier is automatically assigned a prefix of "elo_".

   d. For **Description**, enter a description of the ELO.

   e. For **Objectives**, enter one or more learning objectives that the ELO satisfies.

6. Click **Save**.

   The ELO is created.

   **Note:** After you are done making changes to the Catalog, you must click **Exit** to exit the Catalog Manager. Clicking **Exit** updates the Catalog to reflect your changes. Once the ELO appears in the Catalog, any learners who have been assigned the parent folder (directly or indirectly) can access the ELO.

7. If necessary, assign the ELO to users and groups as needed. For more information, see **Assign and Deassign Curricula** on page 17.
Edit an ELO

To edit an ELO

1. Click **Content | Catalog** on the navigation bar.

   The Catalog Manager appears.

2. In the Browse Catalog pane, browse to or search for the folder that contains the ELO that you want to edit.

3. Move your mouse over the folder title, and click the **Edit Contents** link that appears.

   The contents of the Edit Contents pane on the right are now filtered to display only the affected folder.

4. In the Edit Contents pane, move your mouse over the title of the ELO, and click the **Edit** link that appears, as shown below.

5. In the **Edit External Learning Object (ELO)** dialog box, edit the information for the ELO, and click **Save**.

   **Note:** After you are done making changes to the Catalog, you must click **Exit** to exit the Catalog Manager. Clicking **Exit** updates the Catalog to reflect your changes.

Remove an ELO

**Note:** Removing an ELO from one folder automatically removes all instances of that ELO from all other folders. The ELO is permanently removed from the site.

To remove an ELO

1. Click **Content | Catalog** on the navigation bar.

   The Catalog Manager appears.

2. In the Browse Catalog pane, browse to or search for the folder that contains the ELO that you want to remove.

3. Move your mouse over the folder title, and click the **Edit Contents** link that appears.

   The contents of the Edit Contents pane on the right are now filtered to display only the affected folder.
4. In the Edit Contents pane, move your mouse over the title of the ELO, and click the **Remove** link that appears, as shown below.

5. Click **OK** to confirm the removal.

**Note:** After you are done making changes to the Catalog, you must click **Exit** to exit the Catalog Manager. Clicking **Exit** updates the Catalog to reflect your changes.
Content

Learning Programs

Learning Programs
A learning program consists of folders and learning assets. Each learning program has a root folder with a specified completion criteria. The root folder defines the basic attributes of the learning program and can have both learning assets and child folders. Each child folder can have its own completion criteria. These child folders can contain learning assets and child folders of their own.

Learning Program Completion
Learning programs are presented in a hierarchical (tree view) form, and completion of a learning program is determined by the completion criteria specified for its folders. A folder's rules are imposed on its immediate children unless a child is a folder with its own rules, in which case the child folder's rules apply.

The completion criteria for a folder can be one of the following:

- **Complete All**: Complete all courses in the folder in any order.
- **Complete In Order**: Complete all courses in the folder in a specific, forced order. A learner must complete the first course before the link for the second course becomes active, and so on.
- **Complete Any \{N\}**: Complete a specified number of the courses in the folder, for example, "Complete Any 3." You must specify the number of courses that must be completed.
- **Optional**: No courses in the container need to be completed.

**Note**: If all of the assets in a learning program are optional, a learner's status in the learning program is automatically changed to Completed when the learner enrolls. This is because there are no requirements for completion.
As a learner completes a learning program, the learner receives a % Completed score. This value is determined by dividing the number of completed courses by the total number of courses in the learning program. Learning assets for which progress cannot be tracked (for example, a lone document or a URL) are not included in this calculation.

As an example, examine the contents of the following sample learning program for IT professionals.

Note the following about the program:

- The IT Professional Program root folder has the rule of completing all children (in order). However, note that its last immediate child is also a folder (Other Technologies) with its own rule that stipulates it as optional. Because the rule for the lower-ranked folder applies, the Other Technologies folder and its child(ren) are optional rather than required. As a result, the course in the Other Technologies folder does not count toward completion of the learning program.

- Because the IT Professional Program root folder has the rule of completing all children in order, a learner must complete all children as follows:
  i. Complete the requirements for the Business Skills folder.
  ii. Complete the Design Concepts for Web Sites course.
  iii. Complete the requirements for the Software Development folder.
  iv. Complete the Oracle8i Database Administration course.
• In the Business Skills folder, a learner must complete *any 2 of the 3* learning assets *in any order*. If the learner completes a 3rd asset in this folder, it does not count toward completion of the learning program.

• In the Software Development folder, a learner must complete *both courses in any order*.

In total, a learner must complete 6 of the 8 courses in the program. This means that if the learner were to complete 1 required and 1 elective course (or 2 required courses), the learner would have completed 1/3 or 33% of the learning program.

**View Existing Learning Programs**

**To view existing learning programs**

1. Click **Content | Learning Programs** on the navigation bar.

   The Manage Learning Programs page appears, which lists all of the custom learning programs that have been created on your site. By default, the learning programs are sorted by title.

2. To view the details of a learning program, click (plus sign).
Create a Learning Program

This topic describes how to create a learning program from scratch. However, if an existing learning program closely resembles the desired program, you can copy the existing program instead and then modify its contents as needed. For more information, see Copy a Learning Program on page 73.

To create a learning program from scratch

1. Click Content | Learning Programs on the navigation bar.

   The Manage Learning Programs page appears, which lists all of the custom learning programs that have been created on your site.

2. Click New Learning Program at the top of the page.

3. Enter information about the properties of the learning program using the fields provided. Refer to the following table for a description of each field.

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>(Required) The name of the learning program.</td>
</tr>
<tr>
<td>ID</td>
<td>An alphanumeric ID to uniquely identify the learning program in the system. This value must be 250 characters or less, and it cannot start with an underscore. If you do not enter an ID, one will be automatically generated for the learning program.</td>
</tr>
<tr>
<td>Requires Approval to Enroll</td>
<td>Select this check box if learners must request approval from their designated approval managers</td>
</tr>
</tbody>
</table>
to enroll in the learning program. If you select this check box, learners who are not enrolled cannot access the learning assets in the learning program.

<table>
<thead>
<tr>
<th>Completion</th>
<th>The completion criteria for the root folder in the learning program:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• <strong>Complete all items</strong>: Learners must complete all of the items in the folder, but they can do so in any order.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Complete all items in order</strong>: Learners must complete all of the items in the folder in a specific, forced order. In other words, a learner must complete the first item before the link for the second item becomes active, and so on.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Complete any &lt;N&gt; items</strong>: Learners must complete a specified number (N) of the items in the folder, but they can do so in any order. You must specify the number of items that must be completed.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Learning Program is optional and does not have to be complete</strong>: Learners do not have to complete any of the items in the root folder, nor do they have to complete any of the items in any child folders. If you select this option, a learner is considered to have completed the learning program as soon as he or she has enrolled.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description</th>
<th>A description of the contents of the learning program. This value must be 4,000 characters or less.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objectives</td>
<td>The objectives (goals) of the learning program. This value must be 4,000 characters or less.</td>
</tr>
<tr>
<td>Internal Notes</td>
<td>Any information you want to note about the learning program for administrators. These notes do not appear on the learning program summary page that learners can view. This value must be 4,000 characters or less.</td>
</tr>
</tbody>
</table>

If you can also enter a start date and an end date, see **Scoped Learning Programs** on page 80 for more information.

4. Click **Save**.
Note: At this point, the learning program is saved, added to the list of custom learning programs on the Manage Learning Programs page, and added as the last asset in the Learning Programs folder in the Catalog. This means that if you have assigned (exposed) the Learning Programs folder to any groups or individual users, the learning program is now accessible to them by browsing the Catalog (and by using SEARCH&LEARN once the next run of Search indexing has occurred for your site).

The Edit Learning Program page appears, as shown in the following example. In the left pane, the SkillPort Catalog is displayed. In the right pane, the root folder is displayed.

5. Add learning assets to the root folder, and add child folders (to contain related learning assets) to the root folder, as appropriate. For help with this step, see Edit a Learning Program on page 76.

6. Click Save in the lower-right corner of the page, and click Exit.

At this point, you might want to do the following:

- Relocate the learning program or copy it into additional catalog folders. To get started with this, select Admin Home in the upper-right corner, and then click Catalogs in the Management submenu. For more information, see Catalog on page 52.

- Assign the learning program to one or more groups or individual users. To get started with this, select the learning program, and click Manage Enrollments. For more information, see Enroll Users or Groups on page 41.
Copy a Learning Program

This topic describes how to create a learning program by copying an existing program and modifying its contents as needed. However, you can also create a learning program from scratch; for more information, see Create a Learning Program on page 70.

To copy a learning program

1. Click Content | Learning Programs on the navigation bar.
   
   The Manage Learning Programs page appears, which lists all of the custom learning programs that have been created on your site.

2. Select the learning program that you want to copy, and click Copy at the top of the page.

3. Enter information about the properties of the learning program using the fields provided. Refer to the following table for a description of each field.

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>(Required) The name of the learning program.</td>
</tr>
<tr>
<td>ID</td>
<td>An alphanumeric ID to uniquely identify the learning program in the system. This value must be 250 characters or less, and it cannot start with an underscore. If you do not enter an ID, one will be automatically generated for the learning program.</td>
</tr>
<tr>
<td>Requires Approval to Enroll</td>
<td>Select this check box if learners must request approval from their designated approval managers</td>
</tr>
</tbody>
</table>
Completion

The completion criteria for the root folder in the learning program:

- **Complete all items**: Learners must complete all of the items in the folder, but they can do so in any order.

- **Complete all items in order**: Learners must complete all of the items in the folder in a specific, forced order. In other words, a learner must complete the first item before the link for the second item becomes active, and so on.

- **Complete any <N> items**: Learners must complete a specified number (N) of the items in the folder, but they can do so in any order. You must specify the number of items that must be completed.

- **Learning Program is optional and does not have to be complete**: Learners do not have to complete any of the items in the root folder, nor do they have to complete any of the items in any child folders. If you select this option, a learner is considered to have completed the learning program as soon as he or she has enrolled.

Description

A description of the contents of the learning program. This value must be 4,000 characters or less.

Objectives

The objectives (goals) of the learning program. This value must be 4,000 characters or less.

Internal Notes

Any information you want to note about the learning program for administrators. These notes do not appear on the learning program summary page that learners can view. This value must be 4,000 characters or less.

If you can also enter a start date and an end date, see *Scoped Learning Programs* on page 80 for more information.

4. Click **Save**, and click **OK**.
Note: At this point, the learning program is saved, added to the list of custom learning programs on the Manage Learning Programs page, and added as the last asset in the Learning Programs folder in the Catalog. This means that if you have assigned (exposed) the Learning Programs folder to any groups or individual users, the learning program is now accessible to them by browsing the Catalog and using SEARCH&LEARN™.

The Edit Learning Program page appears. Because you have copied an existing learning program, the new learning program (shown in the right pane) contains all of the assets in the original learning program.

5. Edit the contents of the new learning program as needed. For help with this step, see Edit the Contents of a Learning Program on page 76.

6. Click Save in the lower-right corner of the page, and click Exit.

At this point, you might want to do the following:

- Relocate the learning program or copy it into additional catalog folders. To get started with this, select Admin Home in the upper-right corner, and then click Catalogs in the Management submenu. For more information, see Catalogs on page 52.

- Assign the learning program to one or more groups or individual users. To get started with this, select the learning program, and click Manage Enrollments. For more information, see Enroll Users or Groups on page 41.
Edit a Learning Program

The topics in this section describe how to modify a learning program in various ways, and they assume you have already opened the learning program for editing (that is, the Edit Learning Program page is displayed).

To open a learning program for editing

1. Click Content | Learning Programs on the navigation bar.

   The Manage Learning Programs page appears, which lists all of the custom learning programs that have been created on your site.

2. Select the learning program that you want to edit, and click Edit at the top of the page.

   The Edit Learning Program page appears, with the contents of the learning program displayed in the right pane. Note that both the left pane and the right pane are resizable.

Add or Remove Assets from Folders

To add a learning asset to a learning program

1. Open the learning program for editing.

2. In the Catalog pane on the left, locate the asset that you want to add to the learning program. You can do this in one of two ways:

   ▪ Browse the Catalog by navigating through its structure.

   ▪ Search for the asset using the search controls at the top of the page. For detailed information on the search tool, including tips on creating search expressions, see Search for Assets and Folders.

3. Select the title of the asset that you want to add, drag it to the desired location in the learning program in the Edit Contents pane on the right, and drop it.

   Alternatively, you can select the title of the asset, select the destination folder in the Edit Contents pane, and click between the two panes. If you want to select the root folder of the learning program, select the title of the learning program as the destination.

   **Note:** You can use Shift-click and Ctrl-click to select multiple assets.

4. Click Save in the bottom-right corner, and then click OK.
To remove a learning asset from a learning program

1. Open the learning program for editing.

2. In the Edit Contents pane on the right, move your mouse over the title of the asset, and click the Remove link that appears.

3. Click OK.

Add or Remove Child Folders

You can add and remove child folders from a learning program as needed. Note that removing a child folder also removes all of the assets within the folder.

To add a child folder to a learning program

1. Open the learning program for editing.

2. In the Edit Contents pane on the right, select the folder in which to create the child folder:
   - To add the folder as a top-level folder in the root folder, select the title of the learning program.
   - To add the folder as a child folder within another folder, select the parent folder.

3. Click New Folder in the upper-right corner of the pane.
   
   The New Folder dialog box is displayed.

4. For Name, enter a name for the folder.

5. For Completion, select the completion criteria for the items that the folder will contain.

6. Click OK.
To remove a child folder in a learning program

1. Open the learning program for editing.

2. In the Edit Contents pane on the right, move your mouse over the title of the folder, and click the **Delete** link that appears.

3. Click **OK**.

Reorder Assets and Folders

You can reorder the assets or folders in any folder in a custom learning program. This changes the order in which they are displayed to learners. Be aware that if the parent folder’s completion criteria is Complete All In Order, reordering the items in a folder also affects the order in which learners must complete the items. For more information, see **Learning Programs** on page 67.

To reorder the assets or folders in a learning program

1. Open the learning program for editing.

2. In the Edit Contents pane on the right, select the asset or folder that you want to move, drag it to the desired location, and drop it.
Edit the Properties of a Folder

You can edit the name and completion criteria for any folder in a learning program. The root folder of a learning program has several additional properties that apply to the learning program as a whole, such as the objectives of the learning program and whether the learning program requires approval in order for learners to enroll. You can edit these properties as well.

**To edit the properties of the root folder or a child folder**

1. Open the learning program for editing.

2. In the Edit Contents pane on the right, do one of the following:
   - If you want to edit the properties of the root folder, move your mouse over the title of the learning program, and click the **Edit** link that appears.
   - If you want to edit the properties of a child folder, move your mouse over the title of the folder, and click the **Edit** link that appears.

3. In the Edit Learning Program box (if you are editing the root folder) or Edit Folder dialog box (if you are editing a child folder), edit the properties of the folder as needed. For more information on these properties, see *Create a Learning Program* on page 70.

4. Click **OK**, and then click **Save** to save your changes.
Delete a Learning Program

If you delete a learning program that one or more users have completed, the system warns you that deleting the learning program also deletes the completion data for the learning program as a whole for those users. However, users' completion data against the individual assets remains in the system, which means it remains in their My Progress and is represented in any reports that you run.

To delete a learning program

1. Click Content | Learning Programs on the navigation bar.
   The Manage Learning Programs page is displayed, which lists all of the custom learning programs that have been created on your site.
2. Select the learning program that you want to delete, and click Delete at the top of the page.
3. Click OK twice to confirm and then acknowledge the deletion.

Scoped Learning Programs

A scoped learning program is one that has a specified start date and end date. If your site has been configured to support scoped learning programs, you can enter a start date and an end date when you create a learning program. These settings work as follows:

- **Start Date:** If this date is specified, users begin to receive credit for progress made on the assets in the learning program on this date.
- **End Date:** If this date is specified, users must complete all of the assets in the learning program by this date in order to receive credit for their completion.

In other words, users' progress on the assets in a scoped learning program is tracked only between the start date and end date, inclusive. Progress before and after these dates is never tracked. As a result, if you want to track progress in a scoped learning program indefinitely, do not specify an end date.

Keep in mind that users cannot access the assets in a learning program until they have enrolled in it.

**Note:** Once at least one user has started a scoped learning program (that is, has made some progress), you cannot do any of the following:
- Delete the learning program
- Change the start date or end date
- Add or remove assets
Use the Reporting features to gather data on all aspects of your SkillPort learning management system. To access Reports, click Reports in the navigation bar.

**Note:** Existing reports created prior to SkillPort v7.1 can be accessed through Reports | Legacy Reports.

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Legacy Reporting ................................. 124
Reporting

Getting Started with Reporting

Reporting Overview
The following is a high-level overview of the reporting process.

1. Identify your reporting requirements.

2. Run several reports by previewing the default templates to determine if they meet your needs. The default templates are designed to quickly show the last month of activity and display the most commonly used data fields.

   Note: For a detailed explanation of all fields, filters, and display options included in each template, see Report Definitions.

3. For those default templates that meet your reporting needs you can save the results and you can create schedules to automatically run the report in the future.

4. If you need to further define the results you can create personal templates by modifying the default templates, and then, if desired, create schedules for those templates.
Reporting Overview Diagram

1. Select a template
2. Preview the results
3. Does the template meet your needs?
   - No: Edit the template and preview again; repeat until you are satisfied
   - Yes: Save the results to reuse the data
4. Save the personal template to reuse it in the future
5. Create a schedule for the template to automatically run reports in the future
**Reporting Interface**

The Reports menu includes a link for each section of the reporting feature.

**Templates**

The Templates window contains a list of all report templates available in the Reporting feature. Templates are forms used to determine what dates, filter options, and display options should be included in report results.

*Default templates* are pre-defined templates that are standard with all SkillPort implementations.

*Personal templates* are customized templates you create by modifying default templates.
Reports

Schedules
The Schedules window contains a list of all schedules associated with report templates. Schedules are used to automatically run reports in the future.

There are no default schedules included with Reporting. All schedules are created by the user. Schedules can be created for both Default and Personal Templates.

Results
The Results window displays a list of all saved reports.

Reports are manually saved when you click the Save Results button, and automatically saved when a scheduled report is run.

User and Admin Privileges
User and Administrator privileges impact Reporting in two ways:

- by controlling which groups and users are visible in the Group/ User filter
- by controlling the report results returned in terms of student activity
Groups Visibility
The display of groups within the Group/Users filter is controlled by the User/Group Filter Scoping option in the SkillPort Administrator UI.

When this option is enabled (checked), the standard SkillPort user privileges apply. Visibility of groups and users is controlled by the user's role. For more information see User Privileges by Role on page 8.

When this option is disabled (unchecked), users have greater visibility of the company's group (organizational) structure within the Group/Users filter. The following rules apply:

- **Super Administrator** – Can see all Groups (including Assignment and Advanced Groups), and All users
- **Company Administrator** - Can see all Groups (including Assignment and Advanced Groups), and All users
- **Administrator** – Can see all Groups (including Assignment Groups) and users within their organizational scope.
- **Manager** – Can see all Groups (including Assignment Groups) and users within their organizational scope.

Report Results
The User/Group Filter Scoping option has no affect on the results returned for student activity. Results are always controlled by the standard SkillPort reporting privileges. Report results will include only data for those students a user has permission to view.

In other words, it is possible to see particular users in the Group/Users filter, but still not be able to see data for those users. Running a report with only these users selected can cause an empty result set.

**Note:** As with all User / Group modifications, changes made to this setting will not take effect until after the next database refresh.

About inGenius Reports
When running an inGenius report, Community Administrators can only see results for their communities. Company and Super Administrators can see results for all inGenius communities.
Managing Reports

Understanding Reports
In the Reporting documentation, 'report' refers to the formatted and organized presentation of the data, or results, returned when a query is sent to the database. You can:

- Run a report. When you run a report, the results display in a preview screen. This view is temporary and you must save the results in order to maintain the data.
- Save the report results. Saving reports stores them on the Results window as shown below.
- Schedule a report to automatically run in the future. When a report is generated from a schedule, the results are automatically saved to the Results window.
- Create a Personal template to customize the report results.
### The Results Window

Results are listed in the order the report was run with the most recent at the top. The Results window includes the following columns:

- **Name** - If a report has a recurring schedule associated with it, there may be more than one report with the same name.
- **Description** - Can be modified by the user when the report is saved, or when the schedule for the report is created.
- **Format** - HTML, CSV, or PDF. Determined by the user when the report is saved, or when the schedule for the report is created.
- **Created By** - The name of the user that ran the report.
- **Completed** - The date and time the report was run. May also indicate if a report is "processing".
- **Run time** - The length of time in hh:mm:ss it took for the report to run.
- **Delete On** - The date the report will automatically be deleted from the Results window.
- **Status** - The status of the report. ie: In Progress, Completed, etc.

From the Results window you can:

- **Refresh** the screen to update the list of saved reports.
- Open a saved report result. Saved reports open in the viewer associated with the file format.
- Download the report results. Downloading reports saves them to your hard drive or external storage device.
- Delete a saved report result.
- **Delete All** report results.

**Note:** The results of each report reflect the current data held in SkillPort as of the last successful database refresh which occurs automatically. This includes group structure, user status, asset status, assignments, enrollments, approvals, and data from other platforms.
Run a Report

When you manually run a report you are actually previewing the results. This allows you to determine whether or not the report meets your needs before you save the results. The preview is temporary and you must save the results in order to maintain the data. You can also manually run a report from a schedule in the Schedules tab.

To run a report

1. Click **Templates** from the menu.
2. In the Templates window select either the Default or Personal tab.
3. Select the desired template.
4. Click **Preview**. The Report displays in the Preview window.

5. In the Preview window you can:
   - Sort the data by clicking the column headers.
   - **Edit** the template to modify the dates, filters and display options in order to create a personal template.
   - **Save Template** if this template has been modified.
   - Save Result of the report to the Results tab.

*Note:* Changes to the sort order are not maintained when saving results.
To manually run a scheduled report

1. From the menu click **Schedules**.

2. Select the desired schedule.

3. Click **Run Now**. The report will be saved to the Results window at the top of the list.

**Notes:**

- Reports with a large amount of data may take several minutes to generate a preview.
- If the report contains no data, the column headers will still display, but with empty rows.
- Reports can also be previewed from a Template window.
- Reports run from schedules do not display in the Preview window.
- Some Content Activity and Learning Activity reports contain a 'Completion Status' column. If the Completion Certificate option is enabled in SkillPort, a 'Completed' value in this column will be a hyperlink that allows you to view the certificate. Clicking the link will display the certificate in a separate window.
Save a Report

Saving a report allows you to view the results at a later date without the need to re-run the report.

To save a report

1. Click Templates and select either the Default or Personal tab.
2. Select the desired template.
3. Click Preview. The Preview window displays the results.
4. Click Save Result.
   The Save Result dialog displays with a Properties tab and an Email tab.

5. In the Properties tab, complete all fields as described below.

   - **Name** - (Required) Modifiable field pre-populated with the name of the saved template. Max character limit is 256. Cannot contain the following characters: \\ / : * ? " < > |
   
   - **Description** - Modifiable field pre-populated with the description from the saved template. Field can be blank. Max character limit is 512.
   
   - **Format** - Choices include: HTML4.0, CSV (default), PDF.
   
   - **Delete In** - Determines when the report will be automatically deleted from the Reporting interface. Choices include: 7 Days (default), or 1 Month. To store a report for longer than one month, use the Download option.
   
   - **Include Report Parameters** - When checked, parameters such as template name, description, date generated, input options, and last successful database refresh will display in the results. Default is unchecked.
6. If desired, click the Email tab and check or uncheck the option.

   - **Email Notification** - Sends an email to the user's SkillPort email address that indicates the scheduled report ran. If no email address is specified for the SkillPort user account, this checkbox will be disabled. If the current user account email address is changed, any existing schedules will not be automatically updated.

7. Click OK. The Results window opens with the saved report displayed at the top of the list.

**Note:** If you modified the template, saving the results does not save the template changes. You must save the template first in order to maintain the changes.

---

### Open a Saved Report

**To open a saved report**

1. From the menu click **Results**.
2. Select the desired report result.
3. Click **Open**. The results display in the viewer associated with the saved result's file type.

### Download a Saved Report

Reports saved on the Results tab can be saved for a maximum of 30 days. To save the report past the delete date you can download it to your hard drive or external storage device.

**To download a report**

1. From the menu click **Results**.
2. Select the desired report result.
3. Click **Download**.
4. The Save As dialog opens with the name of the report in the filename field.
5. Rename the file, if desired.
6. Choose the **Location** to store the file. The download location will be saved and used as the default location for future downloads.
7. Click **Save**.
Delete a Saved Report

Saved reports will automatically delete according to the Delete On date that was created when the report was saved. However, you can manually delete a report from the Results tab as needed. The corresponding template and schedule (if one exists) are not deleted.

Note: The maximum amount of time a report can be stored in the Results tab is 30 days. If you need to access a report past the Delete On date, use the Download option to save the report to your hard drive or external storage device.

To delete a report

1. From the menu click Results.
2. Select the desired report result.
3. Click Delete.
4. Click Yes in the confirmation message. The report is removed from the list.

Optionally, you can delete all the results simultaneously by clicking the Delete All button.
Managing Schedules

Understanding Schedules

Schedules are used to automatically run a report in the future. Schedules can be created for both Default and Personal templates. Each Schedule can have only one template associated with it at a time. You can create a schedule to run once, or on a daily, weekly, or monthly basis.

Saved schedules display in the **Schedules** window.
Schedules are listed in order by *Next Occurrence* date, with the schedule set to run next at the top of the list. The Schedules window includes the following columns:

- **Name** - The name of the schedule also determines the name of results created by the schedule.
- **Description** - User defined.
- **Template** - The default or personal template associated with the schedule.
- **Created By** - The name of the user that created the schedule.
- **Active** - Whether or not the schedule is currently active. You can check or uncheck to modify the setting.
- **Recurrence** - Reflects if the report is scheduled to run once, daily, weekly, or monthly.
- **Last Occurrence** - The last date the report was run from this schedule. If the results have not been deleted, this value will be a hyperlink to the report on the Results tab.
- **Next Occurrence** - The next date the report is scheduled to run.

From the Schedules tab you can:

- Sort the list by clicking the Schedule Name, Schedule Description, or Template Name column headers.
- Click Run Now to run the report immediately.
- Edit the schedule.
- Activate, or deactivate a schedule by checking or unchecking the associated checkbox. Active schedules will run reports at the scheduled time. Inactive schedules will not run reports.
- Delete a schedule. Expired Schedules must be deleted manually. A schedule is considered expired if the *End by* date has passed.
- **Delete All** schedules simultaneously.
Understanding Date Settings
Before creating a schedule there are several important factors to consider when selecting the schedule start and end dates.

- The start date determines when the schedule becomes active. The start date combined with the frequency of the schedule may cause an unexpected result. For instance, if you create a weekly schedule to run a report every Monday, but the start date is a Wednesday, then no report will be created in that first week.

- Activity Date filters will also affect the results of a scheduled report. For instance, if the schedule determines the report should run monthly, but the Activity filters are set to the "Previous 2 Weeks", then the report will not include data for the two missing weeks.

- In order to generate current data each time the report is generated, make sure the Activity Date filters are set to one of the "Previous" options. If you select the From/To options and include both a start and end date, each time the report runs the results will be the same since the dates will not update.

- The time zone for all schedules is the standard UTC time. If you select a different time zone in the template display options, the results generated from a schedule may not reflect the most recent activity.
Create a Schedule

Before creating a schedule, it is important to understand how the schedule dates and the template date filters relate to each other. See Understanding Date Settings on page 96 for more information.

To create a schedule

1. Click Templates and select either the Default or Personal tab.

2. Select the desired template.

3. Click Schedule. The Save Schedule dialog displays with a Properties tab and an Email tab.

4. In the Properties tab complete all fields as described below.

   - **Name** - (Required) Modifiable field pre-populated with the name of the saved template. Creates the name of the schedule and the name of the report generated by the schedule. Max character limit is 256. Accepts alphanumeric characters only. Does not support the use of any special characters.

   - **Description** - Modifiable field pre-populated with the description from the saved template. Field can be blank. Max character limit is 512.

   - **Format** - Determines the format of the saved report generated by the schedule. Choices include: HTML4.0, CSV (default), PDF. When opened, a saved report displays in the viewer associated with the file type on the user's machine.
- **Delete In** - Determines when the report generated by the schedule will be automatically deleted from the Results tab. Choices include: 7 Days (default), or 1 Month. To store a report for longer than one month, use the Download option.

- **Include report parameters** - When checked, parameters such as template name, description, date generated, input options, and last successful database refresh will display in the report generated by the schedule. Default is unchecked.

5. In the **Schedule** section, select the type of schedule you want to create from the drop down. Complete all fields as described below.

**Note:** The time zone for all schedule Start times is UTC.

### One Time Schedule

Create a one time schedule if you only need a snapshot of the data for one period in time.

![One Time Schedule](image)

Complete all fields as described below.

- **Start** - (Required) Determines the date the schedule should become active. The schedule will run the report once and not reoccur. Default is current day's date.

- **Start Time** - (Required) Determines the time of day the report will be queued for execution. Default is 2:00 AM UTC time.

### Daily Schedule

Create a daily schedule if you need the report to run on more than one day a week.

![Daily Schedule](image)

Complete all fields as described below.
Reports

- **Start** - (Required) Determines the date the schedule should become active. Default is current day's date.

- **End by** - Determines the date the schedule becomes inactive and reports stop running. If left blank, the report will reoccur indefinitely.

- **On the following days** - Determines which days of the week the report will run. Select one or more days.

- **Start Time** - (Required) Determines what time of day the report will be queued for execution. Default is 2:00 AM UTC time.

**Weekly Schedule**

Create a weekly schedule to run the report on only one day of the week.

Complete all fields as described below.

- **Start** - (Required) Determines the date the schedule should become active. Default is current day's date.

- **End by** - Determines the date the schedule becomes inactive and reports stop running. If left blank, the report will reoccur indefinitely.

- **On the following day** - Determines which day of the week the report will run. Select only one day.

- **Start Time** - (Required) Determines what time of day the report will be queued for execution. Default is 2:00 AM UTC time.
Monthly Schedule

Create a monthly schedule to run the report on the same day of each month.

![Schedule]

Complete all fields as described below.

- **Start** - (Required) Determines both the date the schedule becomes active and the day of the month the report will run. If the date is 29, 30, or 31 the report will not run for months that do not contain that date.

- **End by** - Determines the date the schedule becomes inactive and reports stop running. If left blank, the report will reoccur indefinitely.

- **Start Time** - (Required) Determines what time of day the report will be queued for execution. Default is 2:00 AM UTC time.

6. If desired, click the **Email** tab and check or uncheck the option.

- **Email Notification** - Sends an email to the user’s SkillPort email address that indicates the scheduled report ran. If no email address is specified for the SkillPort user account, this checkbox will be disabled. If the current user account email address is changed, any existing schedules will not be automatically updated.

7. Click **OK**. The schedule displays on the Schedules window.
Activate or Deactivate a Schedule
You can make an existing schedule active or inactive on the Schedules window without opening the schedule. Inactive schedules will not run reports. Active schedules will run the associated reports as long as the End by date has not passed.

To activate or deactivate an existing schedule
1. From the menu click Schedules.
2. Select the desired schedule.
3. In the Active column click in the checkbox to modify the setting (add check for active, remove check for inactive).

Edit a Schedule
Existing Schedules can be edited to modify the name, description, format and frequency of the schedule. However, you cannot modify which template is associated with the schedule.

To edit a schedule
1. Click Schedules.
2. Select the desired schedule.
3. Click Edit Schedule. The schedule dialog opens with all fields populated with the current settings.
4. Modify the settings as desired. See Create a Schedule on page 96 for a description of all fields.
5. Click OK.

Note: If you change the name of the schedule, the name of any existing reports based on that schedule does not change. However, subsequently generated reports will use the new schedule name.
Delete a Schedule

If you no longer need a scheduled report to run, or a schedule expires, you can delete it from the Schedules window. If a schedule is deleted, any corresponding results will not be deleted until the specified Delete On date.

To delete a schedule

1. From the menu click Schedules.
2. Select the desired schedule.
3. Click Delete.
4. Click Yes in the confirmation message.

Optionally, you can delete all schedules in the list by clicking the Delete All button.
Managing Templates

Understanding Templates
Templates are forms used to determine what dates, filter options, and display options should be included in report results. The SkillPort Reporting tool includes several Default Templates that contain predefined filter and display options and are designed to provide the user with 'out of the box' reporting functionality.

The Default templates can be edited in order to customize the data returned. You can save the customized templates to create Personal Templates.

All templates are stored on the Templates window.
The Templates window is divided into two tabs with system defined templates on the Default tab and user defined templates on the Personal tab. Templates are categorized by the type of data they report on, such as Content and System data. These categories are further divided into subgroups. For instance, the Content category includes template subgroups for reporting on specific asset types such as Learning Programs, ILT Courses, etc.

In the Templates window you can:

- Expand the category folders to see a brief description of each template.
- Preview the report results to verify whether or not the report meets your specific needs.
- **Edit** the template by customizing filters and display options in order to create a personal template.
- Schedule a report to automatically run in the future.

**Create a Personal Template**

In order to meet your specific reporting needs, you can modify the input filters and display options included in a default template and then save the new template to create a personal template. There is no limit to the number of personal templates you can create from each default template. You can also create new personal templates from existing personal templates.

**To create a personal template**

1. From the menu click **Templates**.
2. Select the desired template.
3. Click **Edit**. The following screen displays:
4. If desired, click the following tabs to modify the associated filters:
   - Activity Dates - specifies what period in time the report should include.
   - Group/Users - returns data only for the selected groups or users.
   - Asset Filter - returns data only for the selected asset types.
   - Filter Options - a variety of filters for selecting criteria such as assignment and access dates, specific SkillPort user and group information, completion status, etc.

   **Note**: Template Properties is a read only list.

5. If desired, click the Display Options tab and determine what column headers the report will include, and how the data will display.

6. Optionally, you can preview the report before saving the template to determine if it meets your needs, or you can save the results.

7. To save the template, click **Save As**. The Save dialog displays.

8. Enter a **Name** for the personal template. Name field is mandatory and cannot contain more than 256 characters. The following characters are not allowed: \ / : * ? " < > |

9. Enter a **Description** of the template, if desired. Maximum character limit is 512.

10. Click **OK**. The new template will be saved to the Personal tab and a message will prompt you to create a schedule for this template.

11. Click **Yes** to create a schedule or **No** to display the Personal template tab.
Understanding Filters
There are several different filters available to help refine and customize report results. Filters can be used to return very broad sets of data that give you an overview of your LMS environment, and they can be used to return very specific sets of data within your LMS environment. For instance, you may want to get an overview of how many users actually log into the system each month, or you may want to see specific data on which assets user John Doe completed in the last month.

All filters are accessed within the template window when you create a personal template.

- **Activity Date Ranges** - allow you to determine what period in time the results should include.

- **Filter Date Ranges** - allow you to select one event and then select a date range for that specific event.

- **User and Group related filters** - allow you to select specific groups, subgroups, or users and to filter by data such as user status.

- **Asset related filters** - allow you to display results for specific assets, asset categories, and to filter by data such as content status, Books collections, etc.

- **Additional Filter Options** - includes the Custom filters that allow you to select an option, enter a value, and use an operator to display only data that matches the specific criteria, such as times accessed > 5.

- **Community Filter** - available for inGenius report templates only. Allows you to filter by one or more communities.

Filters are report specific and not all filters display for every report. For a complete listing of all filters available for each report, see Report Definitions.

**Note:** It is possible to select filter options that will return an empty result. For instance, if you select the option *First Accessed* in the Filter Date Range filter and then select the option *Not Accessed* in the Completion Status filter, these filters will negate each other and return no data.
Select Date Ranges

Understanding the Date Range Selectors
There are two types of date range settings that impact the data returned in results.

**Activity Dates** - The Activity Dates allow you to select what time span the results include. For example, you can report on all activity that occurred during the previous two months.

**Filter Dates** - The Filter Dates allow you to select one event and then select a date range for that specific event. For example, you can filter the data to only include assets that have a *Completion Date* within the past two weeks.

Although the date selectors affect data differently, they both function in the same way.

The date selector has two options: **Previous** and **From/To**.

![Date Selector](Image)

The **Previous** option allows you to select an interval of time that is relative to today, or the date the template is accessed. The dates are dynamic and update each time the template is accessed either manually or from a schedule. This option is useful when you want to create recurring schedules that generate results with the most current data.

The **From/To** option allows you to select specific start and end dates. If a value is entered for both the start and end date, the dates are static and do not update if the template is accessed in the future. Typically this option is useful when you want a one-time snapshot of data.

**Note**: When the Previous option is selected, the dates that correspond to the 'Previous [n] [Units]' will display in the From/To option and will refresh accordingly. This provides a valuable aid to help you understand the nature of the dates you are selecting.
**Previous Option**

The intervals for the Previous option include Days, Weeks, Months and Years and each is bound by specific start and end dates, as well as times. You can also select the number of intervals to include, for instance '3 Months' or '2 Weeks'. Each interval has a maximum number of 9999.

The Previous option also provides a **To Date** setting that allows you to include all activity up to the current date and time, regardless of the interval chosen.

- **If To Date is unchecked**, the end date is the last day of the previous interval. For instance, if today is December 31, the 'Previous [n] Months' ends on November 30 and the 'Previous [n] Years' ends on December 31 of the prior year.

- **If To Date is checked**, the end date is always the date the template is accessed, up to and including the most recent database refresh.

The start and end dates for each interval are defined below.

- **Day intervals**
  - Starts at 00:00:00 or 12 midnight, ends at 11:59:59.
  - **Example:** If today is any time on October 31, then the 'Previous 3 Days' starts on October 28 at 00:00:00 and ends on October 30 at 11:59:59.

  **Note:** For all intervals listed below the start and end times are the same as those noted for Day intervals.

- **Week intervals**
  - Starts on Sunday, ends on Saturday.

- **Examples with To Date Unchecked**
  - If today is Sunday October 31, then the 'Previous 2 Weeks' starts on Sunday October 17 and ends on Saturday October 30.
  - If today is Wednesday November 3, then the 'Previous 2 Weeks' starts on Sunday October 17 and ends on Saturday October 30.

- **Example with To Date Checked**
  - If today is Wednesday November 3 then results for the 'Previous 2 Weeks' starts on Sunday October 17 and ends on Wednesday November 3.

- **Month intervals**
  - Starts on the first day of the month, ends on the last day of the month.
• **Examples with To Date Unchecked**
  - If today is October 31, then the ‘Previous 3 Months’ starts on July 01 and ends on September 30.
  - If today is November 3, then the ‘Previous 3 Months’ starts on August 01 and ends on October 31.

• **Example with To Date Checked**
  - If today is November 3 then the ‘Previous 3 Months’ starts on August 01 and ends on November 3.

• **Year intervals**
  - Starts on the first day of the year, ends on the last day of the year.

• **Examples with To Date Unchecked**
  - If today is October 31, 2010, then the ‘Previous 2 Years’ starts on January 1, 2008 and ends on December 31, 2009.
  - If today is any day in 2010, then the ‘Previous 3 Years’ starts on January 1, 2007 and ends on December 31, 2009.

• **Example with To Date Checked**
  - If today is November 3, 2010 then the 'Previous 2 years' starts on January 1, 2008 and ends on November 3, 2010.

**Note**: For all settings that have an end date of today, the results are dependent on the last successful automatic database refresh.

**From/To Option**
The From/To option allows you to set specific dates.

When using the From/To option you must adhere to the following guidelines:

- The To date can be left blank. The From date cannot be left blank.
- If the To date is blank, the end date is always the date the template is accessed, up to and including the most recent database refresh.
- The From date is always the beginning of the day and starts at 00:00:00 or 12 midnight. The ‘To’ date is always the end of the day and ends at 11:59:59. For instance, a range of 1/12/2010 to 1/13/2010 will include 47 hours, 59 minutes, and 59 seconds. (1/12/2010 00:00:00 thru 1/14/2010 11:59:59)
- All dates must be entered in the format YYYY-MM-DD. For instance, 2010-01-01.
- The To date must be later in time than the From date.

**Note**: If you are modifying chart activity dates, there is a limit to the length of time that can be included in the Previous or From/To options. For more information, see Modify Chart Activity Dates.
Selecting Dates

To modify the Activity Dates

1. Click the **Activity Dates** drop down.

2. Select either the **Previous** or **From/To** option.

3. To modify the dates, follow the guidelines above based on the option selected.

To modify the Event Filter Dates

1. Click the **Filter Options** tab.

2. Select an event from the **Filter On** dropdown.

   **Note:** The available events will vary depending on the template selected. For a description of each event see the Report Definitions and refer to the corresponding report. Locate the event in the Display Options section.

3. Select either the **Previous** or **From/To** option.

4. To modify the dates, follow the guidelines above based on the option selected.
Select Groups and Users

The **Group / Users** filter allows you to select specific groups, subgroups, or users. When the report is run, the results will only include data for the groups or users you selected. You can choose to filter by either Groups or Users, but not by both at the same time.

**Note:** Visibility of groups and users within this filter is determined by the User/Group Filter Scoping option in the SkillPort Administrator UI and your user privileges. See **User and Admin Privileges** on page 85 for more information.

**To access the Group/Users filter**

1. From the menu click **Templates**.
2. Select the desired template.
3. Click **Edit**. The Template window displays.
4. Click the **Group / Users** tab. The following screen displays:

The Group/Users filter includes the following sections:

1. **Search Tool** - Allows you to search for specific groups or users.
2. **Groups or Users list** - Displays the list of groups or users you have permission to view.
3. **Selected groups or users** - Displays the list of selected groups or users you want to include in your results.
4. **Additional Filters** - Displays a variety of filters based on the template chosen.
Selecting Groups or Users

To search for specific users or groups
1. Select either the Users or Groups option.
2. Enter your search criteria in the text field.
   For Users, enter a login name, first name, last name, or email address.
   For Groups, enter a group name or org code.
3. Click Search. The users or groups that match your criteria display.
   If no results were found, you are prompted to click Refresh to display the entire list.

To select users or groups
1. In the Groups or Users list (section 2 in the above graphic), select the desired Users or Groups. Use the CTRL or Shift keys to select multiple rows.
2. Click the selection arrow. The selected users or groups display in the selected list (section 3 in the above graphic).

To remove users or groups from the selection
1. In the selected users or groups list, select the desired Users or Groups.
2. Click Remove.
Using Additional Filters

Depending on the Template type accessed, the following filters may be available on the Group/Users Filter tab. To select an option, choose from either a drop down or place a check in the corresponding check box.

- **User Status** - Select students based on their current status of Activated or Deactivated. Select both options to include all users.

- **User Role** - Provides the ability to filter students by their current role. You can select one, or multiple, roles of either End User, Manager, Administrator, Company Administrator, or Super Administrator.

- **Books Seat Status** - Provides the ability to specify users' seat status. Select Any, Occupied, or Deleted.

- **Privilege** - Provides the ability to filter students based on their current privilege. You can select one, or multiple privileges. For a complete list see the specific report in the Reports Definition document.

The Select Subgroups and Rollup Members of Subgroups check boxes effect how your users and subgroups are displayed within the results.

- **Select Subgroups** - Include all subgroups of a selected group.

- **Rollup Members of Subgroups** - Include a subgroup's members and treat them as if they are members of the selected parent group.

These two check boxes can work independently or together, and there are four scenarios for displaying the data. The example below demonstrates the effects of checking and unchecking these options.

For this example, the groups and users are structured as follows:

Group A is the selected group. Group B and Group C are subgroups of Group A.

**Group A**
- User 1
- User 2

**Group B**
- User 3
- User 4

**Group C**
- User 5
- User 6
When you run reports based on these scenarios, the results will include the following rows of information for each user:

If you select group A and leave both check boxes unchecked, only the users from Group A will be included.

- User 1  Group A
- User 2  Group A

If you select group A and check only the **Select Subgroups** check box, the users from the selected group and the subgroups will display as follows:

- User 1  Group A
- User 2  Group A
- User 3  Group B
- User 4  Group B
- User 5  Group C
- User 6  Group C

If you select group A and check only the **Rollup Members of Subgroups** check box, the users from the selected group and the subgroups will display, however the users will be listed as if they are all members of the parent group.

- User 1  Group A
- User 2  Group A
- User 3  Group A
- User 4  Group A
- User 5  Group A
- User 6  Group A

If you select group A and check both **Select Subgroups** and **Rollup Members of Subgroups** check boxes, the users from each group will display as if they are members of their subgroup and the selected parent group. Some users will be duplicated in the list.

- User 1  Group A
- User 2  Group A
- User 3  Group A
- User 4  Group A
- User 5  Group A
- User 6  Group A
- User 3  Group B
Select Assets
The **Asset Filter** tab provides options for including or excluding assets, and selecting assets by category. You can search for specific assets and you can filter by options such as Learning Program status, Books24x7 collections, etc.

**To access the Asset Filters**
1. From the menu click **Templates**.
2. Select the desired template.
3. Click **Edit**. The Template window displays.
4. Click the **Asset Filter** tab.
5. If necessary click the Asset Filter dropdown.

The Asset Filter can include the following sections:

1. **Asset Selector** - Allows you to select specific assets. Content specific templates, such as Learning Program or KnowledgeCenters, will only display assets associated with that content type.
2. **Category Selector** - Allows you to select assets by category.
3. **Selected Assets** - Displays the selected list of assets you want to include in your results.
4. **Additional Filters** - Displays a variety of filters based on the selected template.

**Note:** The screen shot above is an example of filter types included on the Asset Filter tab. This is not a representation of an actual template. Not all asset filters are included in every template.

**Selecting Assets**

**To search for specific assets**

1. Enter your search criteria in the Search text field.
2. Click **Search**. If found, the assets matching your search criteria will display in the Asset Selector section (section 1 in the graphic above), replacing the assets displayed by default.

**To select specific assets**

1. From the **Asset Selector**, select the desired asset(s). The Add arrow enables.
2. Click the **Add Arrow**. The assets are added to the Selected Assets list.

**To select asset categories**

1. In the **Category Selector** expand or collapse the list as desired.
2. Select one or more categories.

**To remove selected assets**

1. In the **Selected Assets** list select the desired asset(s). The Remove button enables.
2. Click **Remove**.

**Note:** The Asset and the Category filters are not related and are applied to the results sequentially. For instance, it is possible to select a specific **Course** from the Asset filter, but a **Book** category from the Category filter. This will produce an empty result set.
Using Additional Filters
Depending on the Template type accessed, the following filters may be available on the Asset Filter tab. To select an option choose from either a drop down or a multi-selection list. These filters may be the only filters on the tab, or they may display below the Asset and Category Filters.

- **Learning Program Status** - Select All, Enrolled (but not started), Started, Completed, Declined, Pending, or Withdrawn
- **Subscription ID** - Select from one of the subscription id(s) available. Defaults to All.
- **Collections** - Select one or more collections (Books and Videos) the user is entitled to.
- **Evaluation** - Select one evaluation from the list. Changing the selection may modify the assets displayed in the Asset Selector list.
Apply Additional Filter Options
The Filter Options tab includes a variety of filters for customizing the data returned in results.

1. From the menu click **Templates**.
2. Select the desired template.
3. Click **Edit**. The Template window displays.
4. Click the **Filter Options** tab.
5. If necessary click the Filter Options dropdown.

The Filter Options tab can include the following sections:

1. **Filter Dates** - The Filter Dates, labeled 'Filter On' in the above image, allow you to select one event and then select a date range for that specific event. See **Select Date Ranges** on page 107 for information on using this filter.
2. **Custom Filters** - The Custom filters are comparison filters that can be used together or individually. See below for information on using these filters.
3. **Additional Filters** - A variety of filters can display in the additional filters section. These filters are typically asset or user related, depending on the type of template selected. See below for information on using these filters.

**Note**: The screen shot above is an example of filter types included on the Filter Options tab. Not all filters are included in every template.
Filter1 and Filter2 Custom filters

The filter1 and filter2 controls allow you to select an option, enter a value, and use an operator to display only data that matches the specific criteria. You can use only one of the filters, or you can choose an option for filter1, and then further define the criteria by choosing 'and', or 'or' for the option selected in filter2.

Each filter consists of a drop down with available options, a drop down with applicable operators, and a field for entering the appropriate value. Both the operator and the value field will automatically change depending on the type of option chosen.

For example, in the screen shot below, the option selected for filter1 is numerical. The operator drop down includes choices such as '=', '<', '>', etc. The value field is a text field for entering numbers. The option selected for filter2 is date based. The operator drop down includes choices such as 'on', 'before', 'after', etc. The value field includes a calendar picker for entering a date.

Note: For all fields that calculate a 'duration', such as Actual Duration or Average Duration per User, enter the value as a number of minutes. For example, 2:00 (2 hours) should be entered as 120.

The 'and' / 'or' option determines if you want the data returned to match both filter criteria, or the criteria from either filter.

When these filters are available, a minimum default list is included, but some templates also include report specific options. To see a list of options available for specific templates see Report Definitions.

Warning: Although the Custom filters are very powerful and flexible they are not the preferred way to filter general cases such as getting data for a specific user or asset. The criteria in these filters are applied to the data after the query is sent to the database. If these are the only filters applied, it may take several minutes for the report to run. Using the Group / Users filter or the Asset filter is much faster since these filters are applied before the query is sent to the database.

To filter data with the Custom filters

1. From the menu click Templates.
2. Select the desired template.
3. Click Edit. The Template window displays.
4. Click the Filter Options tab.
5. If necessary, click the Filter Options drop down.
6. Select an option from the filter1 drop down.
7. Select an operator from those available.
8. Enter a value in the value field.

9. Optionally, select 'and' or 'or' from the drop down and repeat the above steps for the filter2 fields.

**Additional Filters**
Depending on the Template type accessed, the following filters may be available on the Filter Options tab. To select an option choose from either a drop down or a multi-selection list.

- **Completion Status Filter** - Filters data based on the user's status for assets that are completable. Select Any, Completed, or In Progress.

- **Exception Condition** - Filters data based on exception conditions. Select None, Completion not Achieved, or Exceeded Due Date.

- **Participation** - Filters data based on whether or not the user has participated in any SkillPort content. Select Both, Participated, or Not Participated.

**Select Display Options**
Display Options allow you to control two aspects of report data:

1. How the data displays within the rows. These options are grouped together at the top of the Display Options tab.

2. What column headers, or fields of data, are included in the output. Column header check boxes are grouped together in the lower portion of the Display Options tab.

**To access display options**
1. From the menu click **Templates**.

2. Select the desired template.

3. Click **Edit**. The Template window displays.
Reports

4. Expand the **Display Options** tab.

![Display Options](image)

**Displaying Data**
Several options allow you to control how the data within the rows and columns is displayed. Not all options are available in each template. The following list explains the affect of applying these options.

- **Select Time Zone** - Specifies the time zone used for both the filters and the output. Default is UTC. For reports without this option, the default is used.
  
  **Note:** The time zone setting effects data returned in results only. All other features such as schedule times, result deletion times, etc., use the UTC standard time zone.

- **Include timestamp** - Appends hours, minutes and seconds to any date strings displayed within the report. Format is `YYYY-MM-DD hh:mm:ss`

- **List Users within multiple groups in separate rows** - Used to determine the display of records for users that are in multiple groups. If `multiple` is selected, a record will display for every group of which the user is a member. If `single` is selected, only one record for the user will display and group related fields will display a value of 'multiple'. This option is only applicable to reports that are sorted by user or asset and user. This option is not applicable for reports that are sorted by group.

- **Include Empty Subgroups** - When checked, empty subgroups will display in the results.

- **Show Assets with no Activity** - When checked, assets with no activity display in the results.
To select display options

1. At the top of the Display Options tab locate the checkboxes.
2. Check or uncheck the desired options.

Column Headers
Column Headers determine what fields will be included in the report results. For each template, several column headers are selected by default, but can be selected and unselected as desired. For convenience, many of the column headers are grouped by category according to the type of data they display.

To select column headers

1. At the bottom of the Display Options tab locate the Column checkboxes.
2. Check or uncheck the desired options.

When the report is run, the results will contain a column for each option selected.

Note: Each template contains at least one column header that is required. However, these options do not display in the user interface since unchecking them would cause an error when running the report. See Report Definitions for a list of all column headers and display options included in each template.

Edit a Personal Template
You can edit a Personal template to modify the filters and display options.

To edit a Personal template

1. From the menu click Templates.
2. Click the Personal tab.
3. Select the desired template.
4. Click Edit. The Template window opens.
5. Modify the filters and display options as desired.
6. Click Save.

Optionally, you can copy the Personal template by clicking Save As and renaming the template.
Delete a Personal Template

Personal templates can be deleted, however you cannot delete a Default template.

**Note:** You cannot delete a Personal template that has an associated schedule unless you delete the schedule first.

To delete a Personal template

1. From the menu click **Templates**.
2. Click the **Personal** tab.
3. Select the desired template.
4. Click **Delete**.

If a Schedule is associated with this template, a message will display asking you to confirm whether or not you want to delete the Template and its associated Schedule. You must click **Yes** and delete the schedule in order to delete the Personal template.

Both the Personal template and the associated schedule will be deleted.
Legacy Reporting

Common Report Features
SkillPort's reports are all inclusive. A report run on a user group includes all subgroups of that group. While each report provides a unique view of your users' progress, they all share several common report features. For more information see Manage Saved Reports on page 127 and Report Types on page 133.

Tracking

- The Login Name and/or Learner Name (User) fields are populated even if a course does not yet have results.

- A course will register as having been accessed as soon as the user clicks the Download or Play button.

- A course will register as having been downloaded if the user clicks the Download button, whether or not the download completed.

- In the Details reports, downloaded courses or topics are identified in the Summary section.

- Downloaded topics:
  - are identified as courses in reports.
  - do not include assessments and so the Assessment fields are populated with a - (dash).
Scoring Assessments

- Course averages are calculated by adding up the scores for the lessons taken, then dividing by the number of lessons taken. Scores are summarized tallied for each type: Preassess, High, and Current. Lessons that are not taken are counted towards the average with a score of 0.

- Preassess is the score just for the Preassess. High is the highest score for either Preassess or mastery. Current is the most recent score for either Preassess or mastery.

- Courses are counted as completed if the usage complies with the method of completion.

- A - (dash) indicates that the assessment was not taken.

- A 0 (zero) indicates that no questions were correctly answered.

- In reports that show all lesson scores (Details and Learner Record), only lessons taken display.

Common Fields

- First Access - the date the course was first played.
- Last Access - the most recent date the course was played.
- Duration - the sum total of all the playing time.
- Times Accessed - the number of times this user launched the course.

**Note:** Some types of assets, such as external learning objects, cannot be identified as accessed or complete due to their nature; therefore, some information might not be available in the report.

Report Scheduling

All reports excluding the Active Session Report have general report scheduling capabilities.

Setting up a recurring (scheduled) report, setting up a report and running it later (saving an unscheduled report), deleting a report, and editing the parameters of a report are some of the common features of reports in SkillPort. For more information see Manage Saved Reports on page 127 and Report Types on page 133.

Report scheduling options are:

- **Run Now** - The report will run immediately.

- **Save Unscheduled** - The report parameters are saved, without any schedule or run-time.
• **Save Scheduled** - The report parameters are saved, with a periodic run schedule, and a first time to run.

• **One Time** - Select the Next Run Date and the Next Run Time from the drop-down list.

• **Recurring** - Select Weekly, Semi-Monthly, or Monthly and select or clear the Cumulative check box (some reports may not have the Cumulative option).

  **Weekly** reports provide usage from midnight on Monday (12:00:00 AM) through Sunday (11:59:59 PM). This option generates 52 individual reports every year.

  **Semi-monthly** reports provide usage from the 1st of month (12:00:00 AM) to the 15th of the month (11:59:59 PM). The first report will run on the 16th of the month. The remainder of the semi-monthly data—from the 16th (12:00:00 AM) through the end of month (11:59:59 PM on the last day)—will appear on the report that runs on the 1st of the following month. This option generates 24 reports every year.

  **Monthly** reports provide usage from the 1st of the month (12:00:00 AM) through the end of the month (11:59:59 PM on the last day). This option generates 12 individual reports every year.

  **Cumulative** reports only have a start date. It you disable the **Cumulative** check box, the report has a start and an end date.

Periodic scheduled reports let you schedule reports to auto-run periodically, as cumulative reports or for certain periods only.

The following reports support the **Cumulative** option:

• Course Completion Report

• Miscellaneous Activity Report

• Executive Overview Report

• Evaluation Report

• Non-Participating Users Report

• Credentialing Report
Manage Saved Reports

The Manage Saved Reports page displays a list of reports that were previously scheduled, unscheduled, or saved. The report listing table displays the name of the report, the name of the user who ran the report, the description of the report, and when or how often the report was scheduled to run.

To access this menu item, select Reports | Legacy Reports | Manage Saved Reports on the navigation bar.

You can run, edit, create a copy, or delete a saved report using the following controls:

<table>
<thead>
<tr>
<th>Control</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Run Report</td>
<td>Click to run the report. The following message appears: &quot;Report submitted.&quot; To view the report, select Reports</td>
</tr>
<tr>
<td>Edit Report</td>
<td>Click to edit the report. The Report parameter page appears. You can change settings such as the name of the report and the scheduled date. For more information, see Reports on page 127.</td>
</tr>
<tr>
<td>Copy Report</td>
<td>Click to create another copy of the report. The copy appears in the Manage Saved Report list and is renamed as follows: Copy of &lt;report name&gt;.</td>
</tr>
<tr>
<td>Delete report</td>
<td>Click to delete the report from the list.</td>
</tr>
</tbody>
</table>

**Note:** If a user has been deleted, all saved reports for the relevant user are automatically deleted from the list. If a user has been deactivated, the saved reports remain but the periodic reports do not run. Also note that, to enhance storage utilization and maximize SkillPort's report performance, saved reports are only available for a maximum of 30 days. SkillSoft makes every effort to ensure that saved reports are always available during this window; however, unforeseen maintenance may result in a loss of saved reports. As a result, SkillSoft strongly recommends that you download critical reports as soon as they are generated.

Run Reports

You can run a variety of reports that allow you to track and analyze the training progress, site usage, collection management, user management, and more.

The information displayed in each report depends on the user profile of the person running the report. For example, if you are logged in as a super administrator, you may run a report on any user or group. If you are logged in as a manager, you may only run reports on your assigned user group and any related subgroups.

See Common Report Features on page 124 for more details.

**Note:** To enhance storage utilization and maximize report performance, saved reports are only available for a maximum of 30 days. SkillSoft makes every effort to ensure that saved reports are always available during this window; however, unforeseen maintenance may result in a loss of saved reports. As a result, SkillSoft strongly recommends that you download critical reports as soon as they are generated.
To run a report


2. Select the name of the report from the list of available reports.

3. Specify the report settings. For information on these settings, review the description of the report in Report Types on page 133.

4. Click Submit.

View Reports

The View Reports page shows a list of reports that are currently running or those that have been generated and are ready for review. Select a report title to open and view the report in a new window. The report listing table shows the name of the user who ran the report, the date and time the report was submitted, when it was completed, and the format the report was generated in.

Reports currently being generated have a - (Dash) under Date Completed and Format. The course title link will not become available for these reports until the report has been generated. Select the Refresh button to see if the report is “Complete” and ready for viewing.

**Note:** The time displayed in the View Reports window is the local time of the site hosting your site.
If more than fifteen reports are available, use the buttons located above and below the available reports to page through the available report listings.

**Report Details**

Select the button next to a report to view the Report Details or that report.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>The report Type.</td>
</tr>
<tr>
<td>User</td>
<td>The user ID for the Administrator who requested the report.</td>
</tr>
<tr>
<td>Status</td>
<td>The current status of a report request. The report status will indicate if the Report request has been Submitted or if the request is Complete.</td>
</tr>
<tr>
<td>Date Submitted</td>
<td>The date and time the report request was submitted.</td>
</tr>
<tr>
<td>Date Completed</td>
<td>The date and time the report request was completed.</td>
</tr>
<tr>
<td>Execution Time</td>
<td>The amount of time taken to generate the report.</td>
</tr>
<tr>
<td>File Name</td>
<td>The File Path lists the physical location of report that was generated and its location on the site's server.</td>
</tr>
</tbody>
</table>

Select the **View Report** link to view the report and close the Report Details Window. Select the **Close** link to close the Report Details window without viewing the report.
Viewing a Report

Note: To enhance storage utilization and maximize report performance, saved reports are only available for a maximum of 30 days. SkillSoft makes every effort to ensure that saved reports are always available during this window; however, unforeseen maintenance may result in a loss of saved reports. As a result, SkillSoft strongly recommends that you download critical reports as soon as they are generated.

To view a report:

1. Select the View Reports link on the Reports menu.

2. Select the link for the report you want to view. Or, select the button next to a report and select the View Report link from within Report Details window. The report will now appear in a separate window.

When viewing reports, note that some reports include deactivated users, while other reports do not, as shown in the following table.

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Deactivated Users Included</th>
<th>Deactivated Users Not Included</th>
<th>Customize to Include Deactivated Users or Not</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Course Listing</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Course Completion</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Custom</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>User Activity</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Miscellaneous Activity</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Course Activity Report</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Executive Overview</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Course Utilization</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>User Listing by Group</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Evaluation</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Non-Participating Users</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>KnowledgeCenter Access</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Leadership Advantage</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Learning Program</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Credentialing</td>
<td></td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>
Deleting a Report
To delete a report:

1. Select the check box next to the report on the View Reports page. Select the **Delete** button.

2. To delete all currently displayed reports, select the **Select All** button. Select the **Delete** button.

3. To deselect all reports marked for deletion, select the **Select None** button.

**Note:** Reports marked for deletion are *not* retained when paging through available report pages.

Important Note Regarding Times Displayed in CSV Reports
You can select UTC (GMT) or Local Time for the display of certain time fields in CSV reports. Please refer to the Configuration | Report Configuration section for more details.

HTML report times all appear in UTC (GMT) format.

Report Output Format
Select HTML to generate a report that you immediately want to review and save in HTML. Select CSV (UTF-16) or CSV (UTF-8) to generate report data that you can import into another program. If you are creating a report using double-byte characters, select UTF-16.

**Notes:**
For a UTF-16 CSV file, Microsoft Excel™ automatically places all content in the first column of a spreadsheet. When using the Convert Text to Columns Wizard, Excel treats ALL commas as separators (even those enclosed in ",,"). Prior to running the wizard, you should remove any embedded commas (e.g. those that appear in a course title) from the row in order for the content to appear in the correct column.

User or group names which have a leading minus (-) or plus (+) character will be treated as formulas if they appear in a CSV report and the report is then opened in Excel.

Display UTF-16 CSV Report
To display UTF-16 CSV files in Excel:

1. Open the CSV file in Microsoft Excel.
2. Select column **A**.
3. Select **Data** from the Excel toolbar.
4. From the Data menu, select **Text to Columns**.
5. Select **Delimited** from the Original data type options window.
6. Select **Next**.
7. From the Delimiters options window, deselect **TAB** - select **Comma**...
8. Select **Next**.

9. Select **Finish**.
Report Types
The topics in this section describe the Legacy Reporting reports that may be available to you depending on the configuration of your site.

Full Course Listing Report
The Full Course Listing report lists all available courses in Catalog Manager. There are two types of Full Course Listing Reports:

- **Summary** - The Summary report lists all available courses in the Catalog Manager.
- **Detailed** - The Detailed report lists all available catalogs with a listing of the individual courses within each catalog in the Catalog Manager. Courses will appear more than once on this report if they reside in separate catalogs.

**Note:** The total number of courses that appear will depend on the user's login privileges. Also note that CCA (Common Course Architecture) courses published by Publisher do not count as custom in a Full Course Listing Report; they are counted as SkillSoft courses.
### Full Course Listing Report Options

The Full Course Listing Report allows you to generate a report based on the criteria you choose. You can specify the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Allows you to enter a unique name for the report.</td>
</tr>
<tr>
<td>Description</td>
<td>A short description of the report.</td>
</tr>
<tr>
<td>Select report type</td>
<td>Allows you to select the type of report: <strong>Summary</strong> or <strong>Detailed</strong>.</td>
</tr>
<tr>
<td>Schedule</td>
<td><strong>Run Now</strong> - The report runs immediately.</td>
</tr>
<tr>
<td></td>
<td><strong>Save Unscheduled</strong> - The report parameters are saved, without any schedule or run time.</td>
</tr>
<tr>
<td></td>
<td><strong>Save Scheduled</strong> - The report parameters are saved, with a periodic run schedule, and a first time to run. The date and time of subsequent runs is based on the first run’s date and time:</td>
</tr>
<tr>
<td></td>
<td><strong>One Time</strong> - Select the Next Run Date and the Next Run Time from the drop-down list.</td>
</tr>
<tr>
<td></td>
<td><strong>Weekly</strong> reports provide usage from midnight on Monday (12:00:00 AM) through Sunday (11:59:59 PM). This option generates 52 individual reports every year.</td>
</tr>
<tr>
<td></td>
<td><strong>Semi-monthly</strong> reports provide usage from the 1st of month (12:00:00 AM) to the 15th of the month (11:59:59 PM). The first report will run on the 16th of the month. The remainder of the semi-monthly data—from the 16th (12:00:00 AM) through the end of month (11:59:59 PM on the last day)—will appear on the report that runs on the 1st of the following month. This option generates 24 reports every year.</td>
</tr>
<tr>
<td></td>
<td><strong>Monthly</strong> reports provide usage from the 1st of the month (12:00:00 AM) through the end of the month (11:59:59 PM on the last day). This option generates 12 individual reports every year.</td>
</tr>
<tr>
<td></td>
<td><strong>Cumulative</strong> reports only have a start date. It you disable the <strong>Cumulative</strong> check box, the report has a start and an end date.</td>
</tr>
</tbody>
</table>

| Send notification email | Select the check box to send a notification email. The check box appears only if the email address exists for the logged-in user. |
Output Format | The following output formats are available:  
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>HTML</td>
<td>CSV (UTF-16)</td>
</tr>
</tbody>
</table>
| For more information, see the Report Output section below.

Report Output
The report is sorted by course number, and displays the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Series Title/Course Title</td>
<td>The content titles available to the user currently logged in that are installed to the user database.</td>
</tr>
<tr>
<td>Duration (in H:M)</td>
<td>The estimated time a user should expect to complete the learning event.</td>
</tr>
<tr>
<td>Course Number</td>
<td>The SkillSoft assigned number associated with a Series or Course Title.</td>
</tr>
</tbody>
</table>

Generating the Full Course Listing Report

1. From the Reports menu, select Run Reports.
2. From the Run Reports list, select Full Course Listing Report.
3. If desired, enter a new Name for the report.
   
   **Note:** You can customize the name of the report by entering a unique name, and save or run the report with different settings.

4. If desired, enter a short Description for the report.
5. Select the type of the report (Summary or Detailed).
6. Select one of the following options: Run Now, Save Unscheduled, Save Scheduled (One Time or Recurring).
   
   **Note:** Non-cumulative reports have a start and end date. Cumulative reports only have a start date.

7. If desired, select the Send notification email check box.
   
   **Note:** This check box only appears if an e-mail address exists for that logged in user.

8. Select the report output format.
9. When you have the appropriate selections made, click the Submit button.
Course Completion Report

The Course Completion report displays all users and their completed courses within a specified time frame. This report is sorted by the user's last name, first name, and then login name.

If you select this report, you are prompted to select the report options from the table, and then click the Submit button.

Course Completion Report Options

The Course Completion Report allows you to generate a report based on the criteria you choose. You can specify the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Allows you to enter a unique name for the report.</td>
</tr>
<tr>
<td>Description</td>
<td>A short description of the report.</td>
</tr>
<tr>
<td>Schedule</td>
<td>• <strong>Run Now</strong> - The report runs immediately.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Save Unscheduled</strong> - The report parameters are saved, without any schedule or run time.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Save Scheduled</strong> - The report parameters are saved, with a periodic run schedule, and a first time to run. The date and time of subsequent runs is based on the first</td>
</tr>
</tbody>
</table>

Select output format:  HTML  CSV  CSV (UTF-16)*

* Only use UTF-16 if you expect double byte characters in your report.
(see online help for working with UTF-16 files in Excel)
**Reports**

run’s date and time:

**One Time** - Select the Next Run Date and the Next Run Time from the drop-down list.

**Recurring** - Select Weekly, Semi-Monthly, or Monthly and select or clear the **Cumulative** check box.

- **Weekly** reports provide usage from midnight on Monday (12:00:00 AM) through Sunday (11:59:59 PM). This option generates 52 individual reports every year.

- **Semi-monthly** reports provide usage from the 1st of month (12:00:00 AM) to the 15th of the month (11:59:59 PM). The first report will run on the 16th of the month. The remainder of the semi-monthly data—from the 16th (12:00:00 AM) through the end of month (11:59:59 PM on the last day)—will appear on the report that runs on the 1st of the following month. This option generates 24 reports every year.

- **Monthly** reports provide usage from the 1st of the month (12:00:00 AM) through the end of the month (11:59:59 PM on the last day). This option generates 12 individual reports every year.

- **Cumulative** reports only have a start date. If you disable the **Cumulative** check box, the report has a start and an end date.

<table>
<thead>
<tr>
<th>Start Date and End Date</th>
<th>Allows you to specify a range of dates for the report.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send notification email</td>
<td>Select the check box to send a notification email. The check box appears only if the email address exists for the logged-in user.</td>
</tr>
<tr>
<td>Output Format</td>
<td>The following output formats are available:</td>
</tr>
<tr>
<td></td>
<td>- HTML</td>
</tr>
<tr>
<td></td>
<td>- CSV (UTF-16)</td>
</tr>
<tr>
<td></td>
<td>- CSV (UTF-8)</td>
</tr>
</tbody>
</table>

For more information, see the Report Output section below.
**Report Output**

The Course Completion Report displays the following information:

<table>
<thead>
<tr>
<th><strong>Field</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Covering Dates</td>
<td>The specified date range for the report period.</td>
</tr>
<tr>
<td>Login Name</td>
<td>The login ID used to access SkillPort.</td>
</tr>
<tr>
<td>Full Name</td>
<td>The User's full name beginning with the last name first.</td>
</tr>
<tr>
<td>Course Title</td>
<td>The title of a completed course.</td>
</tr>
<tr>
<td>Course Number</td>
<td>The course number for a completed course.</td>
</tr>
<tr>
<td>Date of Completion</td>
<td>The date the course was completed.</td>
</tr>
</tbody>
</table>

**Generating the Course Completion Report**

1. From the Reports menu, select **Run Reports**.
2. From the Run Reports list, select **Course Completion Report**.
3. If desired, enter a new **Name** for the report.
   
   **Note:** You can customize the name of the report by entering a unique name, and save or run the report with different settings.
4. If desired, enter a short **Description** for the report.
5. You can specify a date range to narrow down the results by selecting a **Start Date** and **End date**.
6. Select one of the following options: Run Now, Save Unscheduled, Save Scheduled (One Time or Recurring).
7. If you select **Recurring** as the **Save Scheduled** option, select:
   - Weekly/semi-monthly/monthly
   - The Cumulative check box and select a Start Date from the drop-down list.
   
   **Note:** Non-cumulative reports have a start and end date. Cumulative reports only have a start date.
8. If desired, select the **Send notification email** check box.
   
   **Note:** This check box only appears if an email address exists for the logged-in user.
9. Select the report output format.
10. When you have the appropriate selections made, click the **Submit** button.
   
   **Note:** Deactivated users are not listed.
Custom Report

The Custom report allows you to define the information that will be displayed. The results can be sorted by course number or by user name.

Custom Report Options

The Custom report allows you to generate a report based on the criteria you choose. You can specify the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Allows you to enter a unique name for the report.</td>
</tr>
<tr>
<td>Description</td>
<td>A short description of the report.</td>
</tr>
<tr>
<td>Report By</td>
<td>Allows you to choose if the report will display all users, an assignment group, a group of users, or a specific user.</td>
</tr>
<tr>
<td>Specific User Search</td>
<td>If you chose Specific User in the Report By field, enter the user’s login name, last name or first name. The fewer details you provide, the broader the search will be.</td>
</tr>
</tbody>
</table>
### Reports

#### Schedule

- **Run Now** - The report runs immediately.
- **Save Unscheduled** - The report parameters are saved, without any schedule or run time.
- **Save Scheduled** - The report parameters are saved, with a periodic run schedule, and a first time to run. The date and time of subsequent runs are based on the first run's date and time.

**One Time** - Select the Next Run Date and the Next Run Time from the drop-down list.


- **Weekly** reports provide usage from midnight on Monday (12:00:00 AM) through Sunday (11:59:59 PM). This option generates 52 individual reports every year.

- **Semi-monthly** reports provide usage from the 1st of month (12:00:00 AM) to the 15th of the month (11:59:59 PM). The first report will run on the 16th of the month. The remainder of the semi-monthly data—from the 16th (12:00:00 AM) through the end of month (11:59:59 PM on the last day)—will appear on the report that runs on the 1st of the following month. This option generates 24 reports every year.

- **Monthly** reports provide usage from the 1st of the month (12:00:00 AM) through the end of the month (11:59:59 PM on the last day). This option generates 12 individual reports every year.

#### Date Range

Allows you to specify a range of dates for the report. Note that Date range is not available if you are specifying a specific user.

- Select **Use First Access Date** if you only want to include the course information with respect to courses that simply have been accessed, including the date a user first played the course.

- Select **Use Most Recent Date** if you only want to include the course information with respect to courses that simply have been accessed, including the date a user last played the course.

- Select **Use Completion Date** if you only want to include the course information with respect to courses that have been completed, based on the defined Course Completion Criteria.

- Select **Any Access Date** if you only want to include the course information with respect to courses that simply have been accessed, without using a specific date restriction.
### Reports

<table>
<thead>
<tr>
<th>List Report Details By</th>
<th>Allows you to choose if the report will be sorted by course or by user.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include Deactivated Users in Report</td>
<td>Select <strong>Yes</strong> to include deactivated users, based on the defined User Manager settings you access from the SkillPort Administrator's Management link. Select <strong>No</strong> to only include active users.</td>
</tr>
<tr>
<td>Include Users in My Subgroups in Report</td>
<td>Select <strong>Yes</strong> to include user's group hierarchy information in the report. Or select <strong>No</strong> to only report the user name.</td>
</tr>
<tr>
<td>Output Format</td>
<td>Select <strong>HTML</strong> to generate a report that you immediately want to review and save in HTML. Select <strong>CSV (UTF-16)</strong> or <strong>CSV (UTF-8)</strong> to generate report data that you can import into another program. If you are creating a report using double-byte characters, select <strong>UTF-16</strong>.</td>
</tr>
</tbody>
</table>

**Notes:**

- For a UTF-16 CSV file, Microsoft Excel™ automatically places all content in the first column of a spreadsheet. When using the Convert Text to Columns Wizard, Excel treats ALL commas as separators (even those enclosed in ","). Prior to running the wizard, you should remove any embedded commas (e.g. those that appear in a course title) from the row in order for the content to appear in the correct column.

- User or group names which have a leading minus (-) or plus (+) character will be treated as formulas if they appear in a CSV report and the report is then opened in Excel.

To display UTF-16 CSV files in Excel:

1. Open the CSV file in Microsoft Excel.
2. Select column A.
3. Select Data from the Excel toolbar.
4. From the Data menu, select **Text to Columns**.
5. Select **Delimited** from the Original data type options window.
6. Select **Next**.
7. From the Delimiters options window, deselect **TAB** - select **Comma**.....
8. Select **Next**.
9. Select **Finish**.
### Single Line Per User (For CSV Only)
If this switch is set to **Yes** when running a Custom Report, results for users belonging to multiple groups will only appear once rather than duplicating for each group the user belongs to.

### Send notification email
Select to send a notification email. The check box appears only if the email address exists for the logged-in user.

### Report Output
A Custom report in HTML format displays the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course</td>
<td>The learning event number and name.</td>
</tr>
<tr>
<td>Last Access</td>
<td>The last date the learning event was launched during the specified report period.</td>
</tr>
<tr>
<td>First Access</td>
<td>The date the learning event was first launched.</td>
</tr>
<tr>
<td>Times Accessed</td>
<td>The total number of times a learning event was accessed during the specified report period.</td>
</tr>
<tr>
<td>Duration</td>
<td>The total accumulation of time spent in a learning event during the report period. This value is expressed in hours, minutes, and seconds (HH:MM:SS). <strong>Note:</strong> Regardless of the date range you specify for the report, this value is always a cumulative value from the first course launch through the current date and time.</td>
</tr>
<tr>
<td>Completion Date</td>
<td>The date the learning event was completed.</td>
</tr>
</tbody>
</table>

#### Overall Assessments

| Pre       | The score for a pretest within a course or lesson. Pretests can only be taken once. If pre-tests are not enabled, the name of this column changes to First Score and displays the score for the first time that you took this test. |
| High      | The average of the highest scores received for each individual objective. |
| Current   | The score achieved the last time the test was taken.                       |

#### Group Summary

| Total Course Accesses | The total number of learning events accessed during the specified report period. |
| Distinct Courses Accessed | The sum total of all the distinct courses launched by all the users. For example, if 5 users each launched the same course, the value is 1. If 1 user launched 5 different courses, the value is 5. |
| Total Users           | The total number of users included in the report. Note that only users who have accrued progress in courses are included. |
| Total Training Time   | The total training time accumulated during the specified report period by a specific user, a group of users or all users. |
A Custom report in CSV format displays the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>LoginName</td>
<td>The learner's user name.</td>
</tr>
<tr>
<td>Lastname</td>
<td>The learner's last name.</td>
</tr>
<tr>
<td>Firstname</td>
<td>The learner's first name.</td>
</tr>
<tr>
<td>Email</td>
<td>The learner's email address.</td>
</tr>
<tr>
<td>Sex</td>
<td>The learner's sex.</td>
</tr>
<tr>
<td>Address1</td>
<td>The first line of the learner's address.</td>
</tr>
<tr>
<td>Address2</td>
<td>The second line of the learner's address.</td>
</tr>
<tr>
<td>City</td>
<td>The learner's city.</td>
</tr>
<tr>
<td>State</td>
<td>The learner's state.</td>
</tr>
<tr>
<td>Zip</td>
<td>The learner's zip code (postal code).</td>
</tr>
<tr>
<td>Country</td>
<td>The learner's country.</td>
</tr>
<tr>
<td>Birthdate</td>
<td>The learner's birth date.</td>
</tr>
<tr>
<td>Phone</td>
<td>The learner's phone number.</td>
</tr>
<tr>
<td>CC Number</td>
<td>A customizable field</td>
</tr>
<tr>
<td>CC Type</td>
<td>A customizable field</td>
</tr>
<tr>
<td>CC Expr</td>
<td>A customizable field</td>
</tr>
<tr>
<td>free1</td>
<td>A customizable field</td>
</tr>
<tr>
<td>RegDate</td>
<td>The date and time at which the learner's SkillPort account was created.</td>
</tr>
<tr>
<td>Activated</td>
<td>The status of the learner: 1 for Activated, 0 for Deactivated.</td>
</tr>
<tr>
<td>GroupName</td>
<td>The fully-qualified name of the group in which the learner exists.</td>
</tr>
<tr>
<td>CourseID</td>
<td>The ID of the course.</td>
</tr>
<tr>
<td>CourseTitle</td>
<td>The name of the course.</td>
</tr>
<tr>
<td>FirstAccessDate</td>
<td>The date and time at which the learning event was launched during the specified report period.</td>
</tr>
<tr>
<td>LastAccessDate</td>
<td>The last date and time at which the learning event was launched during the specified report period.</td>
</tr>
<tr>
<td>TimesAccessed</td>
<td>The total number of times a learning event was accessed during the specified report period.</td>
</tr>
</tbody>
</table>
Reports

Duration | The total accumulation of time spent in a learning event during the report period. This value is expressed in seconds.  
| Note: Regardless of the date range you specify for the report, this value is always a cumulative value from the first course launch through the current date and time.

OverallPreassess | The score for a pre-test within a course or lesson. Pre-tests can only be taken once. If pre-tests are not enabled, this field is blank.

OverallHigh | The highest course score, which is the average of the highest scores received for all lesson tests.

OverallCurrent | The current course score, which is the average of the current scores for all lesson tests.

CourseStatus | The learner’s status with respect to the course: Started or Completed.

CompletionDate | The date and time at which the learner completed the course if the value for CourseStatus is Completed.

GroupTitle | The name of the group in which the learner exists.

TimesDownloaded | The total number of times the learner downloaded the course.

OrgCode | The org code of the group in which the learner exists.

ScoID | The ScoID of the course. Applies to SCORM content only.

DueDate | The due date for the asset, if specified.

Generating the Custom Report

1. From the Reports menu, select Run Reports.

2. From the Run Reports list, select Custom Report.

3. If desired, enter a new Name for the report.

| Note: You can customize the name of the report by entering a unique name, and save or run the report with different settings.

4. If desired, enter a short Description for the report.

5. Select or enter the necessary information to include in the report.

| Note: Only fill in the Specific User Search fields if you choose Specific User in the Report By drop-down list.

6. Select the report output format.

7. If desired, select the Send notification email check box.

| Note: This check box only appears if an e-mail address exists for that logged in user.

8. When you have the appropriate selections made, click the Submit button.
**User Activity Report**

There are two types of User Activity reports: Detailed and Summary.

**User Activity Report**

Name: User Activity Report

Description:  

Select Report Type:  ○ Summary  ○ Detailed

○ Run Now  ○ Save Unscheduled  ○ Save Scheduled

<table>
<thead>
<tr>
<th>Schedule</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>○ One Time</td>
<td>○ Recurring</td>
</tr>
<tr>
<td>○ Weekly</td>
<td>○ Semi-Monthly</td>
</tr>
</tbody>
</table>

Next Run Date: January 22, 2008  
Next Run Time: 12:00 AM (Greenwich Mean Time)

☐ Send notification email

Select output format:  ○ HTML  ○ CSV  ○ CSV (UTF-16)*

*Only use UTF-16 if you expect double byte characters in your report.
(see online help for working with UTF-16 files in Excel)

Submit

**User Activity Report Options**

User Activity Report allows you to generate a report based on the criteria you choose. You can specify the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Allows you to enter a unique name for the report.</td>
</tr>
<tr>
<td>Description</td>
<td>A short description of the report.</td>
</tr>
<tr>
<td>Report type</td>
<td>Allows you to select the type of report: <strong>Summary</strong> or <strong>Detailed</strong>.</td>
</tr>
<tr>
<td>Schedule</td>
<td>Run Now - The report runs immediately.</td>
</tr>
<tr>
<td></td>
<td>Save Unscheduled - The report parameters are saved, without any schedule or run time.</td>
</tr>
<tr>
<td></td>
<td>Save Scheduled - The report parameters are saved, with a periodic run schedule, and a first time to run. The</td>
</tr>
</tbody>
</table>
The date and time of subsequent runs is based on the first run’s date and time:

**One Time** - Select the Next Run Date and the Next Run Time from the drop-down list.


- **Weekly** reports provide usage from midnight on Monday (12:00:00 AM) through Sunday (11:59:59 PM). This option generates 52 individual reports every year.

- **Semi-monthly** reports provide usage from the 1st of month (12:00:00 AM) to the 15th of the month (11:59:59 PM). The first report will run on the 16th of the month. The remainder of the semi-monthly data—from the 16th (12:00:00 AM) through the end of month (11:59:59 PM on the last day)—will appear on the report that runs on the 1st of the following month. This option generates 24 reports every year.

- **Monthly** reports provide usage from the 1st of the month (12:00:00 AM) through the end of the month (11:59:59 PM on the last day). This option generates 12 individual reports every year.

<table>
<thead>
<tr>
<th>Send notification email</th>
<th>Select the check box to send a notification email. The check box appears only if the email address exists for the logged-in user.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Output Format</strong></td>
<td>The following output formats are available:</td>
</tr>
<tr>
<td></td>
<td>- <strong>HTML</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>CSV (UTF-16)</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>CSV (UTF-8)</strong></td>
</tr>
</tbody>
</table>

For more information, see the Report Output section below.
Report Output

Detailed Report
This report displays the following information for all users. The report is sorted alphabetically by user name.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Courses Accessed</td>
<td>The sum total of all the courses launched by all the users, (i.e., if 5 users each launched the same course, the total is 5 and if 1 user launched 5 different courses, the total is also 5).</td>
</tr>
<tr>
<td>Total Users</td>
<td>The total number of users that have usage (course launches, downloads, results) reported to the web server.</td>
</tr>
<tr>
<td>Total Training Time (in Hours:Minutes:Seconds)</td>
<td>The total time each user has spent playing each course. [Note: This value is always a cumulative value from the first course launch through the current date and time.]</td>
</tr>
</tbody>
</table>

**Note:** Completed courses appear as [Completed] with the associated date and Downloaded courses appear as [Downloaded].

Summary Report
This report displays the same information as the Detailed User Activity Report, except that the report includes Completion status and does not include the lesson details and downloaded status.

Generating the User Activity Report

1. From the Reports menu, select Run Reports.
2. From the Run Reports list, select User Activity Report.
3. If desired, enter a new Name for the report.
   \[Note: You can customize the name of the report by entering a unique name, and save or run the report with different settings.\]
4. If desired, enter a short Description for the report.
5. Select the type of report (summary or detailed).
6. Select one of the following options: Run Now, Save Unscheduled, Save Scheduled (One Time or Recurring).
7. Select the report output format.
8. If desired, select the Send notification email check box.
   \[Note: This check box only appears if an e-mail address exists for that logged in user.\]
9. When you have the appropriate selections made, click the Submit button.
Miscellaneous Activity Reports

There are three types of Miscellaneous Activity reports:

- **User Login Report** - This report provides information on SkillPort login activity for all users between the specified dates.

  **Note:** The date and time data used for the User Login Report is in Coordinated Universal Time (UTC) format. For example, if you run a report for August 15th, 2007, the report will contain a data line for every login on August 15th for UTC time.

  However, if you attempt to get all logins for a date range in your time zone, the data that falls outside of the UTC date will be left out of the report. The workaround is to run the report for a wider date range, then select the data records that fit the desired local date/time range. For example, if your local time is five hours behind UTC and you only want data for August 15th, run the report for the 15th and the 16th, and then select your data from the report based on local time. If your site is set to display in UTC, you will have to include records up to 05:00 UTC on the 16th.
**Reports**

- **Course Download Report** - This report provides information on course download activity for all SkillPort users between the specified dates. If necessary, you can limit the report by first time downloads only. You can also choose whether to view a list of groups that a user belongs to or whether to just have the text **multiple** in the OrgCode column if a user belongs to multiple groups.

- **Course Launch Report** - This report provides information about course launch activity for all SkillPort users between the specified dates. You can choose whether to view a list of groups that a user belongs to or whether to just have the text **multiple** in the OrgCode column if a user belongs to multiple groups.

**Note:** For all Miscellaneous Activity Reports a check is performed to see if a report is submitted via BCS so that the time zone can be calculated correctly.

**Miscellaneous Reports**

<table>
<thead>
<tr>
<th>Name:</th>
<th>User Login Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description:</td>
<td></td>
</tr>
</tbody>
</table>

- **User Login Report**
- **Course Download Report**
  - Only include first time downloads
  - Include all downloads

- Show all orgcodes a user belongs to
- When user belongs to multiple groups just show **multiple**

- **Course Launch Report**
  - Show all orgcodes a user belongs to
  - When user belongs to multiple groups just show **multiple**

**Run Now**  **Save Unscheduled**  **Save Scheduled**

**Schedule:**
- One Time
- Recurring
- Weekly
- Semi-Monthly
- Monthly
- Cumulative

**Next Run Date:** December 12, 2007
**Next Run Time:** 12:00 AM (GMT)

**Start Date:** January 01, 1990
**End Date:** December 11, 2007

**Send notification email**

**Select output format:**
- CSV
- CSV (UTF-16)*

*Only use UTF-16 if you expect double byte characters in your report. (see online help for working with UTF-16 files in Excel)*

**Submit**
Miscellaneous Activity Report Options

The Miscellaneous Activity Report allows you to generate a report based on the criteria you choose. You can specify the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Allows you to enter a unique name for the report.</td>
</tr>
<tr>
<td>Description</td>
<td>A short description of the report.</td>
</tr>
<tr>
<td>Report type</td>
<td>Allows you to select one of the following types of reports to be generated:</td>
</tr>
<tr>
<td></td>
<td>▪ <strong>User Login Report</strong></td>
</tr>
<tr>
<td></td>
<td>▪ <strong>Course Download Report:</strong></td>
</tr>
<tr>
<td></td>
<td>▪ Only include first time downloads or Include all downloads</td>
</tr>
<tr>
<td></td>
<td>▪ Show all orgcodes a user belongs to or When user belongs to multiple groups just show &quot;<em>multiple</em>&quot;</td>
</tr>
<tr>
<td></td>
<td>▪ <strong>Course Launch Report:</strong></td>
</tr>
<tr>
<td></td>
<td>▪ Show all orgcodes a user belongs to</td>
</tr>
<tr>
<td></td>
<td>▪ When user belongs to multiple groups just show &quot;<em>multiple</em>&quot;</td>
</tr>
<tr>
<td>Schedule</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ <strong>Run Now</strong> - The report runs immediately.</td>
</tr>
<tr>
<td></td>
<td>▪ <strong>Save Unscheduled</strong> - The report parameters are saved, without any schedule or run time.</td>
</tr>
<tr>
<td></td>
<td>▪ <strong>Save Scheduled</strong> - The report parameters are saved, with a periodic run schedule, and a first time to run. The date and time of subsequent runs is based on the first run's date and time:</td>
</tr>
<tr>
<td></td>
<td>▪ <strong>One Time</strong> - Select the Next Run Date and the Next Run Time from the drop-down list.</td>
</tr>
<tr>
<td></td>
<td>▪ <strong>Recurring</strong> - Select Weekly, Semi-Monthly, or Monthly and select or clear the <strong>Cumulative</strong> check box.</td>
</tr>
<tr>
<td></td>
<td>▪ <strong>Weekly</strong> reports provide usage from midnight on Monday (12:00:00 AM) through Sunday (11:59:59 PM). This option generates 52 individual reports every year.</td>
</tr>
<tr>
<td></td>
<td>▪ <strong>Semi-monthly</strong> reports provide usage from the 1st of month (12:00:00 AM) to the 15th of the month (11:59:59 PM). The first report will run on the 16th of the month. The remainder of the semi-monthly data—from the 16th (12:00:00 AM) through the end</td>
</tr>
</tbody>
</table>

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Reports

- Reports of month (11:59:59 PM on the last day)—will appear on the report that runs on the 1st of the following month. This option generates 24 reports every year.
  - **Monthly** reports provide usage from the 1st of the month (12:00:00 AM) through the end of the month (11:59:59 PM on the last day). This option generates 12 individual reports every year.
  - **Cumulative** reports only have a start date. If you disable the Cumulative check box, the report has a start and an end date.

<table>
<thead>
<tr>
<th>Start Date and End Date</th>
<th>Allows you to run the report within a specified range of dates.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send notification email</td>
<td>Select the check box to send a notification email. The check box appears only if the email address exists for the logged-in user.</td>
</tr>
<tr>
<td>Output Format</td>
<td>The following output formats are available:</td>
</tr>
<tr>
<td></td>
<td>- <strong>HTML</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>CSV (UTF-16)</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>CSV (UTF-8)</strong></td>
</tr>
<tr>
<td></td>
<td>For more information, see the Report Output section below.</td>
</tr>
</tbody>
</table>

**Miscellaneous Activity Reports Features**

The table below shows the fields that will be displayed on each Miscellaneous Activity Report.

<table>
<thead>
<tr>
<th>Report Field</th>
<th>Course Download</th>
<th>Course Launch</th>
<th>User Login</th>
</tr>
</thead>
<tbody>
<tr>
<td>LoginName</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>FirstName</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>LastName</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>E-mail</td>
<td>-</td>
<td>-</td>
<td>X</td>
</tr>
<tr>
<td>LoginDate</td>
<td>-</td>
<td>-</td>
<td>X</td>
</tr>
<tr>
<td>TopicCount</td>
<td>X</td>
<td>X</td>
<td>-</td>
</tr>
<tr>
<td>CourseNumber</td>
<td>X</td>
<td>X</td>
<td>-</td>
</tr>
<tr>
<td>CourseTitle</td>
<td>X</td>
<td>X</td>
<td>-</td>
</tr>
<tr>
<td>DownloadDate</td>
<td>X</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>LaunchDate</td>
<td>-</td>
<td>X</td>
<td>-</td>
</tr>
<tr>
<td>Orgcode</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>
Report Output
The Miscellaneous Activity Reports will display the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Login Name</td>
<td>The login ID used to access SkillPort.</td>
</tr>
<tr>
<td>Last Name</td>
<td>The user’s last name.</td>
</tr>
<tr>
<td>First Name</td>
<td>The user’s first name.</td>
</tr>
<tr>
<td>E-mail</td>
<td>The user’s e-mail address.</td>
</tr>
<tr>
<td>Login Date</td>
<td>The date the user logged in between the specified date range.</td>
</tr>
<tr>
<td>Topic Count</td>
<td>The number of topics in a learning event.</td>
</tr>
<tr>
<td>Course Number</td>
<td>The course number for a learning event.</td>
</tr>
<tr>
<td>Course Title</td>
<td>The course title for a learning event.</td>
</tr>
<tr>
<td>Download Date</td>
<td>The date the course was downloaded.</td>
</tr>
<tr>
<td>Launch Date</td>
<td>The date the course was launched.</td>
</tr>
<tr>
<td>OrgCode</td>
<td>The orgcode for the group the user belongs to.</td>
</tr>
</tbody>
</table>

Generating the Miscellaneous Activity Report

1. From the Reports menu, select Run Reports.

2. From the Run Reports list, select Miscellaneous Activity Report.

3. If desired, enter a new Name for the report.

   **Note:** You can customize the name of the report by entering a unique name, and save or run the report with different settings.

4. If desired, enter a short Description for the report.

5. Select the type of report.

   - User Login Report
   - Course Download Report
     - Only include first time downloads
     - Include all downloads
     - Show all orgcodes a user belongs to
     - When user belongs to multiple groups just show "*multiple*"

   - Course Launch Report
     - Show all orgcodes a user belongs to
     - When user belongs to multiple groups just show "*multiple*"

6. You can specify a date range to narrow down the results by selecting a Start Date and End date.
7. Select one of the following options: Run Now, Save Unscheduled, Save Scheduled (One Time or Recurring).

8. If you select **Recurring** as the **Save Scheduled** option, select:

   - Weekly/semi-monthly/monthly
   - The Cumulative check box and select a Start Date from the drop-down list.

   **Note:** Non-cumulative reports have a start and end date. Cumulative reports only have a start date.

9. Select the report output format.

10. If desired, select the **Send notification email** check box.

    **Note:** This check box only appears if an e-mail address exists for that logged in user.

11. When you have the appropriate selections made, click the **Submit** button.
Course Activity Report

There are two types of Course Activity reports:

- **Summary** - This report displays the same information as the Summary User Activity Report except that the report is listed in course number order. Within each course group, the users are listed alphabetically by login name, last name and then first name.

- **Detailed** - This report displays the same information as the Detailed User Activity Report except that the report is listed in course number order. Within each course group, the users are listed alphabetically by login name, last name, then first name. All course information is then identified at the end of the report.

In addition, you can generate a course activity report to display selected courses or course groups.

- **By Course(s)** - Selecting By Course(s) enables the Course Activity Report to be run on an individual course or specific course titles.

- **By Course Group** - Selecting By Course Group enables the Course Activity Report to be run on a specific group of courses.
Course Activity Report Options

The Course Activity Report allows you to generate a report based on the criteria you choose. You can specify the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Allows you to enter a unique name for the report.</td>
</tr>
<tr>
<td>Description</td>
<td>A short description of the report.</td>
</tr>
<tr>
<td>By Course(s) or By Course Group</td>
<td>Allows you to select the type of courses or course groups to display.</td>
</tr>
<tr>
<td>Select report type</td>
<td>Allows you to select one type of Course Activity report: Summary or Detailed.</td>
</tr>
</tbody>
</table>

Schedule

- **Run Now** - The report runs immediately.
- **Save Unscheduled** - The report parameters are saved, without any schedule or run time.
- **Save Scheduled** - The report parameters are saved, with a periodic run schedule, and a first time to run. The date and time of subsequent runs is based on the first run’s date and time:
  - **One Time** - Select the Next Run Date and the Next Run Time from the drop-down list.
    - **Weekly** reports provide usage from midnight on Monday (12:00:00 AM) through Sunday (11:59:59 PM). This option generates 52 individual reports every year.
    - **Semi-monthly** reports provide usage from the 1st of month (12:00:00 AM) to the 15th of the month (11:59:59 PM). The first report will run on the 16th of the month. The remainder of the semi-monthly data—from the 16th (12:00:00 AM) through the end of month (11:59:59 PM on the last day)—will appear on the report that runs on the 1st of the following month. This option generates 24 reports every year.
    - **Monthly** reports provide usage from the 1st of the month (12:00:00 AM) through the end of the month (11:59:59 PM on the last day). This option generates 12 individual reports every year.
    - **Cumulative** reports only have a start date. If you disable the Cumulative check box, the report has a start and an end date.

Send notification email

Select the check box to send a notification email. The check box
Output Format | The following output formats are available:
--- | ---
HTML | HTML
CSV (UTF-16) | CSV (UTF-16)
CSV (UTF-8) | CSV (UTF-8)

For more information, see the Report Output section below.

Report Output
The Course Activity Report displays the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Distinct Courses</td>
<td>The sum total of all the distinct courses launched by all the users, (for example, if 5 users each launched the same course, the total is 1 and if 1 user launched 5 different courses, the total is then 5).</td>
</tr>
<tr>
<td>Total Courses Accessed</td>
<td>The total number of users that have usage (course launches, downloads, results) reported to the web server.</td>
</tr>
<tr>
<td>Total Training Time (in Hours:Minutes:Seconds)</td>
<td>The total time each user has spent playing each course. <strong>Note:</strong> This value is always a cumulative value from the first course launch through the current date and time.</td>
</tr>
</tbody>
</table>

Generating the Course Activity Report
To report by course group (curricula) or course:

1. From the Reports menu, select **Run Reports**.
2. From the Run Reports list, select **Course Activity Report**.
3. If desired, enter a new **Name** for the report.
   
   **Note:** You can customize the name of the report by entering a unique name, and save or run the report with different settings.

4. If desired, enter a short **Description** for the report.
5. Choose a report on selected courses or course groups.
6. To report by Courses, select the **By Course(s)** button:
   
   Click on desired courses to select, press Control to select multiple courses.
7. To report by Course Group, select the **By Course Group** button:

   ![By Course Group]
   
   Select the Group that should apply to this report (deactivated courses are not listed).
8. From the Select Group drop-down list, select the appropriate group (for example, Custom Curricula)
When you select a group, a second drop-down list will appear below the Select Group drop-down list.

9. Continue selecting the appropriate curricula groups or courses from the resulting drop-down list boxes.

   - **By Course Group**
   - Select the Group that should apply to this report (deactivated courses are not listed):

   - [Course Curricula](#)
   - [English - US](#)
   - [Business Skills Curricula](#)
   - [Communication Curriculum](#)
   - [All Selected](#)

10. Select the type of report (Summary or Detailed).

11. Select one of the following options: Run Now, Save Unscheduled, Save Scheduled (One Time or Recurring).

12. If desired, select the **Send notification email** check box.

   **Note:** This check box only appears if an e-mail address exists for that logged in user.

13. Select the report output format.

14. When you have the appropriate selections made, click the **Submit** button.

   **Note:** Neither deactivated courses nor deactivated users are listed.
Executive Overview Report

The Executive Overview Report allows you to assess your return on investment for SkillPort by summary metrics. Select your options for the report and then select Submit.

Executive Overview Report

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Allows you to enter a unique name for the report.</td>
</tr>
<tr>
<td>Description</td>
<td>A short description of the report.</td>
</tr>
<tr>
<td>Show Users</td>
<td>Allows you to select all users, an assignment group, or a group of users to include in the report.</td>
</tr>
<tr>
<td>Include Subgroups</td>
<td>check box - Check to include all subgroups</td>
</tr>
</tbody>
</table>
### Reports

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show Learning Programs</td>
<td>Select to include Learning Program statistics.</td>
</tr>
<tr>
<td>Specific User Search</td>
<td>Enter the user’s login name, last name, or first name. The fewer details you provide, the broader the search is.</td>
</tr>
</tbody>
</table>
| Scheduling                      | **Run Now** - The report runs immediately.  
**Save Unscheduled** - The report parameters are saved, without any schedule or run time.  
**Save Scheduled** - The report parameters are saved, with a periodic run schedule, and a first time to run. The date and time of subsequent runs is based on the first run’s date and time:  
  - **One Time** - Select the Next Run Date and the Next Run Time from the drop-down list.  
  - **Recurring** - Select Weekly, Semi-Monthly, or Monthly and select or clear the **Cumulative** check box.  
  - **Weekly** reports provide usage from midnight on Monday (12:00:00 AM) through Sunday (11:59:59 PM). This option generates 52 individual reports every year.  
  - **Semi-monthly** reports provide usage from the 1st of month (12:00:00 AM) to the 15th of the month (11:59:59 PM). The first report will run on the 16th of the month. The remainder of the semi–monthly data—from the 16th (12:00:00 AM) through the end of month (11:59:59 PM on the last day)—will appear on the report that runs on the 1st of the following month. This option generates 24 reports every year.  
  - **Monthly** reports provide usage from the 1st of the month (12:00:00 AM) through the end of the month (11:59:59 PM on the last day). This option generates 12 individual reports every year.  
  - **Cumulative** reports only have a start date. If you disable the **Cumulative** check box, the report has a start and an end date.  |
| Start Date and End Date         | Allows you to run the report within a specified range of dates.                                                                                                                                              |
| Send notification email         | Select the check box to send a notification email. The check box appears only if the email address exists for the logged-in user.                                                                          |
Output Format

The following output formats are available:

- HTML
- CSV (UTF-16)
- CSV (UTF-8)

For more information, see the Report Output section below.

Report Output

The Executive Overview Report provides summary information on the following metrics:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start date</td>
<td>The start of the report period.</td>
</tr>
<tr>
<td>End date</td>
<td>The end of the report period.</td>
</tr>
<tr>
<td>Registered Users as of mm/dd/yy</td>
<td>The total number of registered users on your company's SkillPort site at the time the report was generated.</td>
</tr>
<tr>
<td>Activated Users</td>
<td>The total number of activated users on your company's SkillPort site at the time the report was generated.</td>
</tr>
<tr>
<td>Deactivated Users</td>
<td>The total number of deactivated users on your SkillPort site at the time the report was generated. (You can deactivate users in the Management page.)</td>
</tr>
<tr>
<td>Cumulative Training Time</td>
<td>The total amount of training time users have spent accessing resources on your company's SkillPort site at the time the report was generated.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Regardless of the date range you specify for the report, this value is always a cumulative value from the first course launch through the current date and time.</td>
</tr>
</tbody>
</table>

User Statistics

The User Statistics provides details on user activity.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participating Users</td>
<td>The number of users who have logged into SkillPort and accessed at least one learning asset during the report period. This includes both learning assets for which progress can be tracked (for example, a course or final exam) and those for which progress cannot be tracked (for example, a SkillBrief or Job Aid).</td>
</tr>
<tr>
<td>Non-Participating Users</td>
<td>The number of SkillPort users who had yet to launch any trackable content during the report period.</td>
</tr>
<tr>
<td>Distinct Users with a completion</td>
<td>The number of distinct SkillPort users who had completed a course during the report period.</td>
</tr>
<tr>
<td>Registered Users as of mm/dd/yy</td>
<td>The total number of registered users on your company's SkillPort site at the time the report was generated.</td>
</tr>
</tbody>
</table>
## Resource Utilization Statistics

The Resource Utilization Statistics provides details on the total number of resources (Learning Events) accessed by both activated and deactivated users.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Resources Accessed</td>
<td>The total number of Learning Events accessed by all users during the report period.</td>
</tr>
<tr>
<td>Distinct Resources Accessed</td>
<td>The total number of distinct Learning Events being accessed during the report period.</td>
</tr>
<tr>
<td>Total Completions</td>
<td>The total number of all Learning Event completions during the report period.</td>
</tr>
<tr>
<td>Access Count</td>
<td>All accesses for all users and all Learning Events during the report period.</td>
</tr>
</tbody>
</table>

## Learning Program Statistics

The Learning Program Statistics provides detailed information on Learning Program Activity.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distinct Users with Learning Programs Activity (Not Completed)</td>
<td>The total number of users who have any activity on at least one Learning Program during the report period. Also includes Learning Programs which were created or assigned before the report period but had activity.</td>
</tr>
<tr>
<td>Distinct Users with Learning Programs Completed</td>
<td>The total number of users who have completed at least one Learning Program during the report period. Also includes Learning Programs which were created or assigned before the report period but had activity.</td>
</tr>
<tr>
<td>Distinct Learning Programs with Activity (Not Completed)</td>
<td>The total number of distinct Learning Programs accessed during the report period.</td>
</tr>
<tr>
<td>Distinct Learning Programs Completed</td>
<td>The total number of distinct Learning Programs completed during the report period.</td>
</tr>
<tr>
<td>Learning Program Enrollments With No Activity</td>
<td>The total number of enrolled Learning Programs with no activity.</td>
</tr>
<tr>
<td>Learning Program Enrollments With Activity</td>
<td>The total number of enrolled Learning Programs with activity during the report period.</td>
</tr>
<tr>
<td>Learning Program Enrollments Completed</td>
<td>The total number of enrollments completed during the report period.</td>
</tr>
</tbody>
</table>
### Notes:
- Total Resource Access includes all events that occur as the result of any user engaging an object (course) at least once. For example, if User X accesses Course A once and User Y accesses Course A five times, the resulting total is two course accesses.

- Access Count represents the total number of times these learning events have been accessed. For example, if User X accesses SkillBrief A once and User Y accesses SkillBrief A five times, the resulting total is six.

- Job Aid and SkillBrief usage only reflects assets launched from SkillPort via the course summary page, My Plan, or Search-and-Learn. Job Aids and SkillBriefs that are accessed from within a launched course are not reflected in this report.

- CCA (Common Course Architecture) courses published by Publisher do not count as custom in an Executive Overview Report; they are counted as SkillSoft courses.

### Generating the Executive Overview Report
1. From the Reports menu, select Run Reports.
2. From the Run Reports list, select Executive Overview Report.
3. If desired, enter a new Name for the report.  
   **Note:** You can customize the name of the report by entering a unique name, and save or run the report with different settings.
4. If desired, enter a short Description for the report.
5. Select the type of user. Select the check box if you need to include subgroups.

   **Show Users:**

   ![Check box for All Users](check_box_all_users.png)

   **Group:** /Internal

   ![Check box for Include Subgroups](check_box_include_subgroups.png)

   **Show Learning Programs:** [ ] (Including Learning Program statistics will increase report time significantly)

6. Select the Show Learning Programs check box to include learning program statistics in the report.

7. You can specify a date range to narrow down the results by selecting a **Start Date** and **End date**.
8. Select one of the following options: Run Now, Save Unscheduled, Save Scheduled (One Time or Recurring).

- Run Now
- Save Unscheduled
- Save Scheduled

### Schedule

- One Time
- Recurring
- Weekly
- Semi-Monthly
- Monthly
- Cumulative

**Next Run Date:** December 12, 2007
**Next Run Time:** 12:00 AM (GMT)

9. If you select **Recurring** as the **Save Scheduled** option, select:

- Weekly/semi-monthly/monthly
- The Cumulative check box and select a Start Date from the drop-down list.

**Note:** Non-cumulative reports have a start and end date. Cumulative reports only have a start date.

10. If desired, select the **Send notification email** check box.

**Note:** This check box only appears if an e-mail address exists for that logged in user.

11. Select the report output format.

12. When you have the appropriate selections made, click the **Submit** button.

**Note:** Deactivated users are included in the report.
Course Utilization Report

The Course Utilization Report combines all users' statistics for a given course. The report is sorted by course number.

Course Utilization Report Options

The Course Utilization Report allows you to generate a report based on the criteria you choose. You can specify the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Allows you to enter a unique name for the report.</td>
</tr>
<tr>
<td>Description</td>
<td>A short description of the report.</td>
</tr>
<tr>
<td>Include deactivated learning objects</td>
<td>Allows you include deactivated learning objects.</td>
</tr>
</tbody>
</table>

Schedule

- **Run Now** - The report runs immediately.
- **Save Unscheduled** - The report parameters are saved, without any schedule or run time.
- **Save Scheduled** - The report parameters are saved, with a periodic run schedule, and a first time to run. The date and time of subsequent runs is based on the first run's date and time:
  - **One Time** - Select the Next Run Date and the Next Run
Reports

Time from the drop-down list.


- **Weekly** reports provide usage from midnight on Monday (12:00:00 AM) through Sunday (11:59:59 PM). This option generates 52 individual reports every year.

- **Semi-monthly** reports provide usage from the 1st of month (12:00:00 AM) to the 15th of the month (11:59:59 PM). The first report will run on the 16th of the month. The remainder of the semi-monthly data—from the 16th (12:00:00 AM) through the end of month (11:59:59 PM on the last day)—will appear on the report that runs on the 1st of the following month. This option generates 24 reports every year.

- **Monthly** reports provide usage from the 1st of the month (12:00:00 AM) through the end of the month (11:59:59 PM on the last day). This option generates 12 individual reports every year.

- **Cumulative** reports only have a start date. If you disable the Cumulative check box, the report has a start and an end date.

<table>
<thead>
<tr>
<th>Send notification email</th>
<th>Select the check box to send a notification email. The check box appears only if the email address exists for the logged-in user.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output Format</td>
<td>The following output formats are available:</td>
</tr>
<tr>
<td></td>
<td><strong>HTML</strong></td>
</tr>
<tr>
<td></td>
<td><strong>CSV (UTF-16)</strong></td>
</tr>
<tr>
<td></td>
<td><strong>CSV (UTF-8)</strong></td>
</tr>
<tr>
<td></td>
<td>For more information, see the Report Output section below.</td>
</tr>
</tbody>
</table>

**Report Output**

The Course Utilization Report displays the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Users Accessed</td>
<td>Indicates the number of users who have launched or downloaded this course (or any part of the course).</td>
</tr>
<tr>
<td>Avg. Duration per User</td>
<td>Indicates the HH:MM:SS of usage time per user. It is calculated by adding up the seconds of usage for every user of the given course, then dividing by the number of users who have accessed the course.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> The seconds of usage for each user is always a cumulative value from the first course launch through the current date and time.</td>
</tr>
<tr>
<td>Users Completed</td>
<td>Indicates the number of users who have completed the course according to the defined criteria.</td>
</tr>
<tr>
<td>-----------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Average Overall Assessments</td>
<td>Shows the average Pre, High and Current scores for the given course. It is calculated by adding the specified users' scores and dividing that by the number of users that accessed the course.</td>
</tr>
</tbody>
</table>

**Generating the Course Utilization Report**

1. From the Reports menu, select **Run Reports**.

2. From the Run Reports list, select **Course Utilization Report**.

3. If desired, enter a new **Name** for the report.

   **Note:** You can customize the name of the report by entering a unique name, and save or run the report with different settings.

4. If desired, enter a short **Description** for the report.

5. Select the following check box to include deactivated learning objects in the report.

   Check here to include deactivated learning objects in the report  

6. Select one of the following options: Run Now, Save Unscheduled, Save Scheduled (One Time or Recurring).

   ![Schedule options](image)

   Select output format:  
   - HTML  
   - CSV  
   - CSV (UTF-16)*  
   * Only use UTF-16 if you expect double byte characters in your report. (see online help for working with UTF-16 files in Excel)

7. If desired, select the **Send notification email** check box.

   **Note:** This check box only appears if an e-mail address exists for that logged in user.

8. Select the report output format.

9. When you have the appropriate selections made, click the **Submit** button.
User Listing by Group Report

The User Listing by Group Report displays all users in all groups and subgroups. The report is sorted by group/subgroup title, then by user name. This allows you to identify a total count of users registered in the entire database. The total number of users is identified at the end of the report.

**Note:** The User Listing by Group report does not include deactivated groups.

### User Listing by Group Report

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
<td>User Listing by Group Report</td>
</tr>
<tr>
<td>Description:</td>
<td></td>
</tr>
<tr>
<td>Select Group Name:</td>
<td>ALL USERS</td>
</tr>
<tr>
<td>Include subgroups:</td>
<td></td>
</tr>
<tr>
<td>Break on subgroups:</td>
<td></td>
</tr>
<tr>
<td>Show empty groups:</td>
<td></td>
</tr>
<tr>
<td>Run Now</td>
<td></td>
</tr>
<tr>
<td>Save Unscheduled</td>
<td></td>
</tr>
<tr>
<td>Save Scheduled</td>
<td></td>
</tr>
<tr>
<td>Schedule</td>
<td></td>
</tr>
<tr>
<td>One Time</td>
<td></td>
</tr>
<tr>
<td>Recurring</td>
<td></td>
</tr>
<tr>
<td>Weekly</td>
<td></td>
</tr>
<tr>
<td>Semi-Monthly</td>
<td></td>
</tr>
<tr>
<td>Monthly</td>
<td></td>
</tr>
<tr>
<td>Next Run Date:</td>
<td>December 12, 2007</td>
</tr>
<tr>
<td>Next Run Time:</td>
<td>12:00 AM (GMT)</td>
</tr>
<tr>
<td>Send notification email</td>
<td></td>
</tr>
</tbody>
</table>

Select output format:  
- HTML
- CSV
- CSV (UTF-16)*

*Only use UTF-16 if you expect double byte characters in your report.
(see online help for working with UTF-16 files in Excel)
This report prompts you to choose a defined group name from the Select Group drop-down list and select from two report options:

- **Include subgroups** - check to include all subgroups of the selected group in the report. Or, leave unchecked to only include the selected group.

- **Break on subgroup** - check to separate each user subgroup into its own list with its own header and footer information. Or, leave unchecked to include all users in one list.

**User Listing by Group Report Options**

User Listing by Group Report allows you to generate a report based on the criteria you choose. You can specify the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Allows you to enter a unique name for the report.</td>
</tr>
<tr>
<td>Description</td>
<td>A short description of the report.</td>
</tr>
<tr>
<td>Group Name</td>
<td>Allows you to select all groups, an assignment group, or a specific group</td>
</tr>
<tr>
<td></td>
<td>of users from the drop-down list. The following options are also available:</td>
</tr>
<tr>
<td></td>
<td><strong>Including subgroups</strong> check box</td>
</tr>
<tr>
<td></td>
<td><strong>Break on subgroup</strong> check box</td>
</tr>
<tr>
<td></td>
<td><strong>Show empty groups</strong> check box</td>
</tr>
<tr>
<td>Schedule</td>
<td><strong>Run Now</strong> - The report runs immediately.</td>
</tr>
<tr>
<td></td>
<td><strong>Save Unscheduled</strong> - The report parameters are saved, without any</td>
</tr>
<tr>
<td></td>
<td>schedule or run time.</td>
</tr>
<tr>
<td></td>
<td><strong>Save Scheduled</strong> - The report parameters are saved, with a periodic run</td>
</tr>
<tr>
<td></td>
<td>schedule, and a first time to run. The date and time of subsequent runs</td>
</tr>
<tr>
<td></td>
<td>is based on the first run’s date and time:</td>
</tr>
<tr>
<td></td>
<td><strong>One Time</strong> - Select the Next Run Date and the Next Run Time from the</td>
</tr>
<tr>
<td></td>
<td>drop-down list.</td>
</tr>
<tr>
<td></td>
<td><strong>Weekly</strong> reports provide usage from midnight on Monday (12:00:00 AM)</td>
</tr>
<tr>
<td></td>
<td>through Sunday (11:59:59 PM). This option generates 52 individual reports</td>
</tr>
<tr>
<td></td>
<td>every year.</td>
</tr>
<tr>
<td></td>
<td><strong>Semi-monthly</strong> reports provide usage from the 1st of month (12:00:00 AM)</td>
</tr>
<tr>
<td></td>
<td>to the 15th of the month (11:59:59 PM). The first report will run on the</td>
</tr>
<tr>
<td></td>
<td>16th of the month. The remainder of the semi-monthly data—from the 16th</td>
</tr>
<tr>
<td></td>
<td>(12:00:00 AM) through the end of month (11:59:59 PM on the last day)—will</td>
</tr>
<tr>
<td></td>
<td>appear</td>
</tr>
</tbody>
</table>
on the report that runs on the 1st of the following month. This option generates 24 reports every year.

- **Monthly** reports provide usage from the 1st of the month (12:00:00 AM) through the end of the month (11:59:59 PM on the last day). This option generates 12 individual reports every year.

<table>
<thead>
<tr>
<th>Send notification email</th>
<th>Select the check box to send a notification email. The check box appears only if the email address exists for the logged-in user.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output Format</td>
<td>The following output formats are available:</td>
</tr>
<tr>
<td></td>
<td>• HTML</td>
</tr>
<tr>
<td></td>
<td>• CSV (UTF-16)</td>
</tr>
<tr>
<td></td>
<td>• CSV (UTF-8)</td>
</tr>
<tr>
<td></td>
<td>For more information, see the Report Output section below.</td>
</tr>
</tbody>
</table>

**Report Output**

The User Listing By Group Report displays the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Displaying Users in Group</td>
<td>The SkillPort group name the users belong to.</td>
</tr>
<tr>
<td>Login Name</td>
<td>The login ID used to access SkillPort.</td>
</tr>
<tr>
<td>Last Name</td>
<td>The user's last name.</td>
</tr>
<tr>
<td>First Name</td>
<td>The user's first name.</td>
</tr>
</tbody>
</table>

**Generating the User Listing by Group Report**

1. From the Reports menu, select **Run Reports**.
2. From the Run Reports list, select **User Listing by Group Report**.
3. If desired, enter a new **Name** for the report.
4. If desired, enter a short **Description** for the report.
5. Select the type of group. You can select one or all of the following check boxes: including subgroups, break on subgroups, and show empty groups.

- **Select Group Name:** *ALL USERS*
  - [ ] including subgroups
  - [ ] break on subgroups
  - [ ] show empty groups
6. Select one of the following options: Run Now, Save Unscheduled, Save Scheduled (One Time or Recurring).

7. Select the report output format.

8. If desired, select the **Send notification email** check box.

   **Note:** This check box only appears if an e-mail address exists for that logged in user.

9. When you have the appropriate selections made, click the **Submit** button.
**Evaluation Report**

The Evaluation report allows you to view a report of your users' feedback on a particular learning asset or set of assets. This report displays the same user information as the Custom Report, as well as the evaluation questions and user-entered answer fields.

**Evaluation Report Options**

The Evaluation report allows you to generate a report based on the criteria you choose. You can specify the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Allows you to enter a unique name for the report.</td>
</tr>
<tr>
<td>Description</td>
<td>A short description of the report.</td>
</tr>
<tr>
<td>Report by</td>
<td>Select the assets for which you want to view evaluation information. Learning programs are listed first in alphanumeric order, followed by individual assets in alphanumeric order. To select multiple assets, hold down the <strong>CTRL</strong> key when you click. You can select (and therefore report on) a maximum of 200 assets at one time.</td>
</tr>
<tr>
<td>Specific user search</td>
<td>Enter the user's login name, last name, or first name. The fewer details you provide, the broader the search is.</td>
</tr>
</tbody>
</table>

**Schedule**

- **Run Now** - The report runs immediately.
- **Save Unscheduled** - The report parameters are saved, without any schedule or run time.
- **Save Scheduled** - The report parameters are saved, with a periodic run schedule, and a first time to run. The date and time of subsequent runs is based on the first run's date and time:
  - **One Time** - Select the Next Run Date and the Next Run Time from the drop-down list.
  - **Recurring** - Select Weekly, Semi-Monthly, or Monthly and select or clear the **Cumulative** check box.
    - **Weekly** reports provide usage from midnight on Monday (12:00:00 AM) through Sunday (11:59:59 PM). This option generates 52 individual reports every year.
    - **Semi-monthly** reports provide usage from the 1st of month (12:00:00 AM) to the 15th of the month (11:59:59 PM). The first report will run on the 16th of the month. The remainder of the semi-monthly data—from the 16th (12:00:00 AM) through the end of month (11:59:59 PM on the last day)—will appear on the report that runs on the 1st of the following month. This option generates 24 reports every year.
### Reports

- **Monthly** reports provide usage from the 1st of the month (12:00:00 AM) through the end of the month (11:59:59 PM on the last day). This option generates 12 individual reports every year.

- **Cumulative** reports only have a start date. If you disable the Cumulative check box, the report has a start and an end date.

<table>
<thead>
<tr>
<th>Date range</th>
<th>Allows you to specify a range of dates for the report.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include deactivated users in report</td>
<td>Select <strong>Yes</strong> to include deactivated users, based on the defined User Manager settings you access from the SkillPort Administrator's Management link. Select <strong>No</strong> to only include active users.</td>
</tr>
</tbody>
</table>
| Output format | The following output formats are available:  
  - HTML  
  - CSV (UTF-16)  
  - CSV (UTF-8)  
  For more information, see the Report Output section below. |
| Send notification email | Select to send a notification email. The check box appears only if the email address exists for the logged-in user. |

### Report Output

The Evaluation Report displays the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Selected Assets</td>
<td>The asset or set of assets previously selected to report by.</td>
</tr>
<tr>
<td>Covering Dates</td>
<td>The specified date range for the report period.</td>
</tr>
<tr>
<td>Certificate #</td>
<td>The unique identifier printed on a certificate for a completed course.</td>
</tr>
</tbody>
</table>
Reports

Generating the Evaluation Report

1. From the Reports menu, select **Run Reports**.

2. From the Run Reports list, select **Evaluation Report**.

3. If desired, enter a new **Name** for the report.

   **Note:** You can customize the name of the report by entering a unique name, and save or run the report with different settings.

4. If desired, enter a short **Description** for the report.

5. Select the asset or set of assets to include in the report.

6. You can specify a user to narrow down the results by entering a login name, last name, or first name.

7. Select one of the scheduling options:

<table>
<thead>
<tr>
<th>Run Now</th>
<th>Save Unscheduled</th>
<th>Save Scheduled</th>
</tr>
</thead>
<tbody>
<tr>
<td>One Time</td>
<td>Recurring</td>
<td>Monthly</td>
</tr>
<tr>
<td>Weekly</td>
<td>Semi-Monthly</td>
<td>Monthly</td>
</tr>
<tr>
<td>Cumulative</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   **Next Run Date:** December 11, 2007
   **Next Run Time:** 12:00 AM (GMT)

8. If you select **Recurring** as the **Save Scheduled** option, select:
   - Weekly/semi-monthly/monthly
   - The Cumulative check box and select a Start Date from the drop-down list.

   **Note:** Non-cumulative reports have a start and end date. Cumulative reports only have a start date.

9. You can specify a date range to narrow down the results by selecting a **Start Date** and **End date**.

<table>
<thead>
<tr>
<th>Date Range:</th>
<th>Specify a date range to narrow the results. (Optional)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include all evaluations</td>
<td>Include evaluations submitted between:</td>
</tr>
<tr>
<td>Start Date:</td>
<td>January 01, 1990</td>
</tr>
<tr>
<td>End Date:</td>
<td>December 11, 2007</td>
</tr>
</tbody>
</table>
10. Select **Yes** to include deactivated users in report.

![Include deactivated users in report]

11. Select the report output format.

12. If desired, select the **Send notification email** check box.

**Note:** This check box only appears if an e-mail address exists for that logged in user.

13. When you have the appropriate selections made, click the **Submit** button.
Non-Participating Users Report

The Non-Participating Users report provides a listing of all users who have not launched any trackable learning events, such as courses, simulations, and Test Prep exams.

### Non-Participating Users Report

<table>
<thead>
<tr>
<th><strong>Name:</strong></th>
<th>Non-Participating Users Report</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Group Name:</strong></td>
<td>ALL USERS</td>
</tr>
<tr>
<td>□ including subgroups</td>
<td></td>
</tr>
<tr>
<td>□ break on subgroups</td>
<td></td>
</tr>
</tbody>
</table>

#### Schedule

- **Run Now**
- **Save Unscheduled**
- **Save Scheduled**

- **One Time**
- **Recurring**
- **Weekly**
- **Semi-Monthly**
- **Monthly**
- **Cumulative**

- **Next Run Date:** December 12, 2007
- **Next Run Time:** 01:00 AM (GMT)

- **Start Date:** January 01, 1990
- **End Date:** December 11, 2007

- **Send notification email**

#### Select output format:

- **HTML**
- **CSV**
- **CSV (UTF-16)**

*Only use UTF-16 if you expect double byte characters in your report. (see online help for working with UTF-16 files in Excel)*

[Submit]
Non-Participating Users Report Options

The Non-Participating Users Report allows you to generate a report based on the criteria you choose. You can specify the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Allows you to enter a unique name for the report.</td>
</tr>
<tr>
<td>Description</td>
<td>A short description of the report.</td>
</tr>
<tr>
<td>Group Name</td>
<td>Allows you to select all users, an assignment group, or a group of users to include in the report. The following options are also available:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Including subgroups</strong> check box - check to include all subgroups of the selected group in the report. Or, leave unchecked to only include the selected group.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Break on subgroups</strong> check box</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Schedule</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>- <strong>Run Now</strong> - The report runs immediately.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Save Unscheduled</strong> - The report parameters are saved, without any schedule or run time.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Save Scheduled</strong> - The report parameters are saved, with a periodic run schedule, and a first time to run. The date and time of subsequent runs is based on the first run's date and time:</td>
</tr>
<tr>
<td></td>
<td>- <strong>One Time</strong> - Select the Next Run Date and the Next Run Time from the drop-down list.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Recurring</strong> - Select Weekly, Semi-Monthly, or Monthly and select or clear the <strong>Cumulative</strong> check box.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Weekly</strong> reports provide usage from midnight on Monday (12:00:00 AM) through Sunday (11:59:59 PM). This option generates 52 individual reports every year.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Semi-monthly</strong> reports provide usage from the 1st of month (12:00:00 AM) to the 15th of the month (11:59:59 PM). The first report will run on the 16th of the month. The remainder of the semi-monthly data—from the 16th (12:00:00 AM) through the end of month (11:59:59 PM on the last day)—will appear on the report that runs on the 1st of the following month. This option generates 24 reports every year.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Monthly</strong> reports provide usage from the 1st of the month (12:00:00 AM) through the end of the month (11:59:59 PM on the last day). This option generates 12 individual reports every year.</td>
</tr>
</tbody>
</table>
### Reports

- **Cumulative** reports only have a start date. If you disable the **Cumulative** check box, the report has a start and an end date.

<table>
<thead>
<tr>
<th>Start Date and End Date</th>
<th>Allows you to specify a range of dates for the report.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send notification email</td>
<td>Select the check box to send a notification email. The check box appears only if the email address exists for the logged-in user.</td>
</tr>
<tr>
<td>Output Format</td>
<td>The following output formats are available:</td>
</tr>
<tr>
<td></td>
<td>- HTML</td>
</tr>
<tr>
<td></td>
<td>- CSV (UTF-16)</td>
</tr>
<tr>
<td></td>
<td>- CSV (UTF-8)</td>
</tr>
<tr>
<td></td>
<td>For more information, see the Report Output section below.</td>
</tr>
</tbody>
</table>

### Report Output

The Non-Participating Users Report displays the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-Participating Users In Group</td>
<td>The group the non-participating users reside in.</td>
</tr>
<tr>
<td>Last Name, First Name (e-mail)</td>
<td>The users last name, first name and e-mail address.</td>
</tr>
<tr>
<td>Login Name</td>
<td>The login ID used to access SkillPort.</td>
</tr>
<tr>
<td>Registration Date</td>
<td>The date the account was registered in SkillPort.</td>
</tr>
<tr>
<td>Last Access Date</td>
<td>The date the learner last accessed trackable content on SkillPort.</td>
</tr>
</tbody>
</table>

### Generating the Non-Participating Users Report

1. From the Reports menu, select **Run Reports**.
2. From the Run Reports list, select **Non-Participating Users Report**.
3. If desired, enter a new **Name** for the report.
   
   **Note:** You can customize the name of the report by entering a unique name, and save or run the report with different settings.
4. If desired, enter a short **Description** for the report.
5. Select the type of group from the drop-down list. Select or clear including subgroups and break on subgroups check boxes.

6. You can specify a date range to narrow down the results by selecting a Start Date and End date.

7. Select one of the following options: Run Now, Save Unscheduled, Save Scheduled (One Time or Recurring).

8. If you select Recurring as the Save Scheduled option, select:
   - Weekly/semi-monthly/monthly
   - The Cumulative check box and select a Start Date from the drop-down list.

   **Note:** Non-cumulative reports have a start and end date. Cumulative reports only have a start date.

9. Select the report output format.

10. If desired, select the **Send notification email** check box.

    **Note:** This check box only appears if an e-mail address exists for that logged in user.

11. When you have the appropriate selections made, click the Submit button.
KnowledgeCenter Report

The KnowledgeCenter report provides summary and detailed information for all users or specific groups who have accessed KnowledgeCenter content.

KnowledgeCenter Report

Name: KnowledgeCenter Report
Description: 

Show Users: ○ All Users
○ Group: Internal
□ Include Subgroups

Include: □ Deactivated Users

Report type: ○ Summary ○ Detailed by User

○ Run Now ○ Save Unscheduled ○ Save Scheduled

Schedule
○ One Time ○ Recurring
○ Weekly ○ Semi-Monthly ○ Monthly

Next Run Date: December 12 2007
Next Run Time: 12:00 AM (GMT)

□ Send notification email

Output format: ○ HTML ○ CSV ○ CSV (UTF-16)*
* Only use UTF-16 if you expect double byte characters in your report.
(see online help for working with UTF-16 files in Excel)

Submit
KnowledgeCenter Access Report Options

The KnowledgeCenter Access Report allows you to generate a report based on the criteria you choose. You can specify the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Allows you to enter a unique name for the report.</td>
</tr>
<tr>
<td>Description</td>
<td>A short description of the report.</td>
</tr>
<tr>
<td>Show Users</td>
<td>Allows you to select all users, an assignment group, or a group of users to include in the report.</td>
</tr>
<tr>
<td>Include subgroups</td>
<td>Check box - check to include all subgroups of the selected group in the report. Or, leave unchecked to only include the selected group.</td>
</tr>
<tr>
<td>Deactivated Users</td>
<td>Select the check box to include users that have been deactivated in the report.</td>
</tr>
<tr>
<td>Report type</td>
<td>Allows you to select the type of report: Summary or Detailed.</td>
</tr>
<tr>
<td>Schedule</td>
<td></td>
</tr>
<tr>
<td>Run Now</td>
<td>The report runs immediately.</td>
</tr>
<tr>
<td>Save Unscheduled</td>
<td>The report parameters are saved, without any schedule or run time.</td>
</tr>
<tr>
<td>Save Scheduled</td>
<td>The report parameters are saved, with a periodic run schedule, and a first time to run. The date and time of subsequent runs is based on the first run’s date and time:</td>
</tr>
<tr>
<td>One Time</td>
<td>Select the Next Run Date and the Next Run Time from the drop-down list.</td>
</tr>
<tr>
<td>Recurring</td>
<td>Select Weekly, Semi-Monthly, or Monthly.</td>
</tr>
<tr>
<td>Weekly</td>
<td>Reports provide usage from midnight on Monday (12:00:00 AM) through Sunday (11:59:59 PM). This option generates 52 individual reports every year.</td>
</tr>
<tr>
<td>Semi-monthly</td>
<td>Reports provide usage from the 1st of month (12:00:00 AM) to the 15th of the month (11:59:59 PM). The first report will run on the 16th of the month. The remainder of the semi-monthly data—from the 16th (12:00:00 AM) through the end of month (11:59:59 PM on the last day)—will appear on the report that runs on the 1st of the following month. This option generates 24 reports every year.</td>
</tr>
<tr>
<td>Monthly</td>
<td>Reports provide usage from the 1st of the month (12:00:00 AM) through the end of the month (11:59:59 PM on the last day). This option generates 12 individual reports every year.</td>
</tr>
</tbody>
</table>
Reports

<table>
<thead>
<tr>
<th>Send notification email</th>
<th>Select the check box to send a notification email. The check box appears only if the email address exists for the logged-in user.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output Format</td>
<td>The following output formats are available:</td>
</tr>
<tr>
<td></td>
<td>- HTML</td>
</tr>
<tr>
<td></td>
<td>- CSV (UTF-16)</td>
</tr>
<tr>
<td></td>
<td>- CSV (UTF-8)</td>
</tr>
<tr>
<td></td>
<td>For more information, see the Report Output section below.</td>
</tr>
</tbody>
</table>

Report Output

KnowledgeCenter Summary Report
The KnowledgeCenter Summary report displays the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>KC ID</td>
<td>a unique alphanumeric identifier for the KnowledgeCenter</td>
</tr>
<tr>
<td>Title</td>
<td>the name/title of the KnowledgeCenter</td>
</tr>
<tr>
<td>Unique Users Accessed</td>
<td>the number of unique users that accessed the KnowledgeCenter</td>
</tr>
<tr>
<td>Total Accesses</td>
<td>the total number of accesses for the KnowledgeCenter</td>
</tr>
</tbody>
</table>

KnowledgeCenter Detailed by User Report
The KnowledgeCenter Detailed by User report displays the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>the login ID of the learner that accessed the KnowledgeCenter</td>
</tr>
<tr>
<td>User e-mail</td>
<td>the learners e-mail address.</td>
</tr>
<tr>
<td>Number of Accesses</td>
<td>the number of times the learner accessed the KnowledgeCenter.</td>
</tr>
<tr>
<td>First Access</td>
<td>the date the learner first accessed the KnowledgeCenter.</td>
</tr>
<tr>
<td>Last Access</td>
<td>the date the learner last accessed the KnowledgeCenter.</td>
</tr>
</tbody>
</table>

Generating the Knowledge Center Access Report
1. From the Reports menu, select Run Reports.
2. From the Run Reports list, select Knowledge Center Access Report.
3. Enter a new Name for the report.
   
   **Note:** You can customize the name of the report by entering a unique name, and save or run the report with different settings.

4. Enter a short Description for the report.
5. Select the type of user. Select the check box if you need to include subgroups and deactivated users.

   Show Users:  ☑ All Users

   ☐ Group:  /Internal

   ☐ Include Subgroups

   Include:  ☐ Deactivated Users

6. Select the type of the report (summary or detailed by User).

7. Select one of the following options: Run Now, Save Unscheduled or Save Scheduled (One Time or Recurring).

   **Note:** Non-cumulative reports have a start and end date. Cumulative reports only have an end date.

8. If desired, select the Send notification email check box.

   **Note:** This check box only appears if an e-mail address exists for that logged in user.

9. Select the report output format.

10. When you have the appropriate selections made, click the Submit button.
Learning Program Progress Report

The Learning Program Progress report summarizes training performance on a designated series of courses. You can run reports for all learning programs, Live Learning courses, or specific learning programs.

**Note:** While you can report on any learning program, you only see records for the learners in your group.

Also note that this report only contains information on courses. If books and other assets are included in a learning program, they do not appear in this report.

**Report Options**

The following table describes the report options that you can specify for a learning program progress report.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>A unique name for the report.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> You can create different learning program progress reports by specifying different report options and then saving each report with a unique name that describes the utilized settings.</td>
</tr>
<tr>
<td>Description</td>
<td>A short description of the report.</td>
</tr>
<tr>
<td>Show Users</td>
<td>Specifies the types of users to include in the report. You can select one of the following:</td>
</tr>
<tr>
<td></td>
<td>▪ <strong>All Users</strong></td>
</tr>
<tr>
<td></td>
<td>▪ <strong>User by Login</strong> and/or Last Name and/or First Name</td>
</tr>
<tr>
<td></td>
<td>▪ <strong>Group:</strong> Select a group from the drop-down list.</td>
</tr>
<tr>
<td></td>
<td>▪ <strong>Group(s) by Orgcode:</strong> You can use '*' and '?' as wildcards.</td>
</tr>
<tr>
<td></td>
<td>The following options are also available:</td>
</tr>
<tr>
<td></td>
<td>▪ <strong>Include Subgroups:</strong> Select this check box to also include all subgroups of the selected group in the report. Clear this check box to include just the selected group.</td>
</tr>
<tr>
<td></td>
<td>▪ <strong>Break on Groups</strong></td>
</tr>
<tr>
<td></td>
<td>▪ <strong>Single Line per User</strong></td>
</tr>
<tr>
<td>Show Programs</td>
<td>Specifies the types of learning programs to include in the report:</td>
</tr>
<tr>
<td></td>
<td>▪ <strong>All Programs</strong></td>
</tr>
<tr>
<td></td>
<td>▪ <strong>Live Learning Only</strong></td>
</tr>
</tbody>
</table>
### Reports

<table>
<thead>
<tr>
<th>Specific Program(s):</th>
<th>Select the desired learning program. To select multiple programs, hold down the CTRL key when you click.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include</td>
<td>Allows you to specify whether to include deactivated users in the report and the types of learning programs to include. You can select one or more of the following:</td>
</tr>
<tr>
<td></td>
<td>- Deactivated Users</td>
</tr>
<tr>
<td></td>
<td>- No Progress LPs</td>
</tr>
<tr>
<td></td>
<td>- Started LPs</td>
</tr>
<tr>
<td></td>
<td>- Completed LPs</td>
</tr>
<tr>
<td><strong>Note:</strong></td>
<td>To generate results, you must select at least one of the following: No Progress LPs, Started LPs, or Completed LPs.</td>
</tr>
<tr>
<td>Report type</td>
<td>Specifies the type of report to generate:</td>
</tr>
<tr>
<td></td>
<td>- Summary</td>
</tr>
<tr>
<td></td>
<td>- Detailed</td>
</tr>
<tr>
<td></td>
<td>- Detailed with Container Info</td>
</tr>
<tr>
<td>Report type</td>
<td>Like reports of the Detailed type, reports of the Detailed with Container Info type provide course-level information for the learning programs included in the report. However, they also contain summary information about the learning program and summary information about the containers in the learning program.</td>
</tr>
<tr>
<td>Group by</td>
<td>Specifies how to group the information in the report:</td>
</tr>
<tr>
<td></td>
<td>- User</td>
</tr>
<tr>
<td></td>
<td>- Learning Program</td>
</tr>
<tr>
<td>Schedule</td>
<td>Specifies when to run the report:</td>
</tr>
<tr>
<td></td>
<td>- Run Now: Runs the report immediately.</td>
</tr>
<tr>
<td></td>
<td>- Save Unscheduled: Saves the report options but does not schedule the report to run.</td>
</tr>
<tr>
<td></td>
<td>- Save Scheduled: Saves the report options and schedules the report to run based on the scheduling options that you select. For recurring reports, the date and time of subsequent runs is based on the first run's date and time.</td>
</tr>
<tr>
<td></td>
<td><strong>One Time:</strong> Select the Next Run Date and the Next Run Time from the drop-down list.</td>
</tr>
<tr>
<td></td>
<td><strong>Recurring:</strong> Select Weekly, Semi-Monthly, or Monthly.</td>
</tr>
<tr>
<td></td>
<td>- Weekly reports provide usage from midnight on the dates specified in the report.</td>
</tr>
<tr>
<td>Reports</td>
<td>Monday (12:00:00 AM) through Sunday (11:59:59 PM). This option generates 52 individual reports every year.</td>
</tr>
<tr>
<td>---------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>• <strong>Semi-monthly</strong> reports provide usage from the 1st of month (12:00:00 AM) to the 15th of the month (11:59:59 PM). The first report will run on the 16th of the month. The remainder of the semi-monthly data—from the 16th (12:00:00 AM) through the end of month (11:59:59 PM on the last day)—will appear on the report that runs on the 1st of the following month. This option generates 24 reports every year.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Monthly</strong> reports provide usage from the 1st of the month (12:00:00 AM) through the end of the month (11:59:59 PM on the last day). This option generates 12 individual reports every year.</td>
</tr>
<tr>
<td>Send notification email</td>
<td>Select this check box to send a notification email to the currently logged-in administrator. Note that the check box appears only if an email address exists for this user.</td>
</tr>
<tr>
<td>Output Format</td>
<td>Specifies the output format:</td>
</tr>
<tr>
<td></td>
<td>• <strong>HTML</strong></td>
</tr>
<tr>
<td></td>
<td>• <strong>CSV (UTF-16)</strong></td>
</tr>
<tr>
<td></td>
<td>• <strong>CSV (UTF-8)</strong></td>
</tr>
<tr>
<td></td>
<td>For more information, see the Report Output section that immediately follows.</td>
</tr>
</tbody>
</table>
### Report Output

The following table describes the information that is shown in a learning program progress report.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning Program Title</td>
<td>The name of the learning program assigned to you. You may see this title in My Plan and in the course catalog.</td>
</tr>
<tr>
<td>First Access</td>
<td>The date and time you first accessed content in a learning program.</td>
</tr>
<tr>
<td>Last Access</td>
<td>The date and time you last accessed content in a learning program.</td>
</tr>
<tr>
<td>% Started</td>
<td>This is the percentage of the learning program you have started. This is determined by dividing the number of started courses by the total number of courses in the learning program. Learning assets that do not have progress are not counted in this calculation.</td>
</tr>
<tr>
<td>% Complete</td>
<td>This is the percentage of the learning program you have completed. This is determined by dividing the number of completed courses by the total number of courses in the learning program. Learning assets that do not have progress are not counted in this calculation.</td>
</tr>
<tr>
<td>Avg. High Score</td>
<td>This is the average of the overall scores for all of the completed and started courses in a Learning Program. Learning Events that do not have scores, and ones where you have not taken any assessments are not counted in this calculation.</td>
</tr>
<tr>
<td>Learning Event Name and status</td>
<td>Course number and title. If you select this hyperlink, you are taken to the course summary page. The current status for the learning event (learning asset) is shown next to the title:</td>
</tr>
<tr>
<td></td>
<td>- Accessed: Learning assets that do not have progress are considered accessed once you have opened and reviewed content.</td>
</tr>
<tr>
<td></td>
<td>- Started: Learning assets that have progress are considered started once you access the course.</td>
</tr>
<tr>
<td></td>
<td>- Completed: Learning assets that have progress are considered completed when you have finished the course.</td>
</tr>
<tr>
<td>Note:</td>
<td>LOT content is not scored in a learning program until the course is launched.</td>
</tr>
<tr>
<td>Single Line Per User</td>
<td>If this switch is set to Yes when running a learning program progress report, results for users belonging to multiple groups appear once. In other words, the results are not duplicated for each group to which the user belongs.</td>
</tr>
<tr>
<td>(For CSV Only):</td>
<td></td>
</tr>
</tbody>
</table>
**Note:** Live Learning courses only appear in the report if the learner is enrolled and has a status other than **not started** for any of the assets. This is consistent with the current learning program behavior.

**To generate a Learning Program Progress Report**

1. From the Reports menu, select **Run Reports**.

2. On the Run Reports page, select **Learning Program Progress Report** in the list of available report types.

3. Specify the report options. For help with this step, see the Report Options section earlier in this topic.

4. Click **Submit** at the bottom of the page.

**Learning Program Certificates**

Learning program certificates are the same as course completion certificates. Administrators can access Learning program certificates from the learning program report when a user has completed a learning program.

**Note:** A Learning Program is complete when a user has completed all courses within it. Also note that, if Generate Certificates has been enabled for Live Learning courses, then the learning program report will have a **Show Certificate** link next to completed Live Learning courses.

**To generate a learning program certificate**

1. Run a learning program progress report as described earlier in this topic.

2. Open the report, and click the **Show Certificates** link next to the completed learning programs.

3. Print the certificate.
Credentialing Report

The Credentialing report summarizes all activity with courses linked to a credential, including user names, scores, and completion dates. To enable Credentialing Reports, select **System -> Credential Administration** and select 'yes' from the **Enable Credentialing Module** drop-down list.

To run a credentialing report, select the report options from the table below:

<table>
<thead>
<tr>
<th>Name:</th>
<th>Credentialing Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description:</td>
<td></td>
</tr>
<tr>
<td>Report By:</td>
<td>Select the Credential to include in the report:</td>
</tr>
<tr>
<td></td>
<td>Credentialing Report</td>
</tr>
<tr>
<td></td>
<td>Pages-Pages</td>
</tr>
<tr>
<td></td>
<td>Evaluations-Evaluations</td>
</tr>
<tr>
<td></td>
<td>All Options-All Options</td>
</tr>
<tr>
<td></td>
<td>Perfect Board-Perfect Score</td>
</tr>
<tr>
<td></td>
<td>Reactivate Board-Deactivate</td>
</tr>
<tr>
<td>Select Group Name:</td>
<td>ALL USERS</td>
</tr>
<tr>
<td></td>
<td>Including Subgroups</td>
</tr>
<tr>
<td>Specific User Search:</td>
<td>Specify a user to narrow the results (Optional):</td>
</tr>
<tr>
<td>Login Name:</td>
<td></td>
</tr>
<tr>
<td>Last Name:</td>
<td></td>
</tr>
<tr>
<td>First Name:</td>
<td></td>
</tr>
<tr>
<td>Schedule:</td>
<td>Run Now</td>
</tr>
<tr>
<td>One Time</td>
<td>Weekly</td>
</tr>
<tr>
<td>Cumulative</td>
<td></td>
</tr>
<tr>
<td>Next Run Date:</td>
<td>December</td>
</tr>
<tr>
<td>Next Run Time:</td>
<td>12:00 AM (GMT)</td>
</tr>
<tr>
<td>Date Range:</td>
<td>Start Date:</td>
</tr>
<tr>
<td></td>
<td>End Date:</td>
</tr>
<tr>
<td>Send notification email:</td>
<td></td>
</tr>
<tr>
<td>Output format:</td>
<td>HTML</td>
</tr>
</tbody>
</table>

* Only use UTF-16 if you expect double-byte characters in your report.

(See online help for working with UTF-16 files in Excel)
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