



Job Aid – External Contractor Administrators Reporting

Date: April 2021
Version 3.0

Table of Contents

Introduction.....	3
Certification Summary Report	3
View Reports	6
Report Output Examples	7
Certification Details Report.....	8
Report Output Examples	10

Introduction

Administrators can self manage competence reporting for their division/company. They can process **Certification Summary** reports that display summary information for certifications, and **Certificate Details** reports that display users' detailed certification statuses.

Administrators will be able to access report templates that are shared with them by System Administrators.

Certification Summary Report

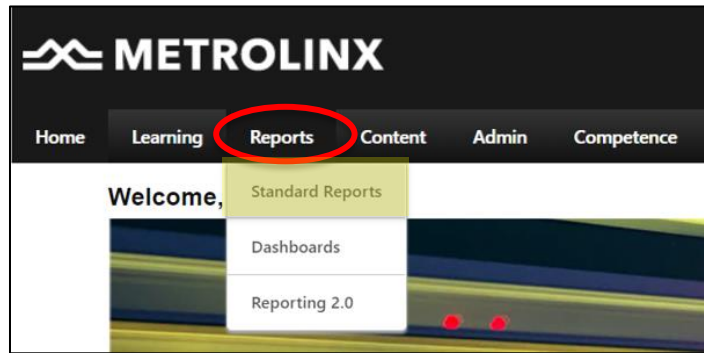
This report enables administrators to report on users' certification statuses. Multiple certifications can be included in this report.

This is an asynchronous report, which allows Administrator to define the standard report and generate the report asynchronously. As a result, when Administrators process the report, the system generates the report in the background, while the Administrator can move on to other areas of the system.

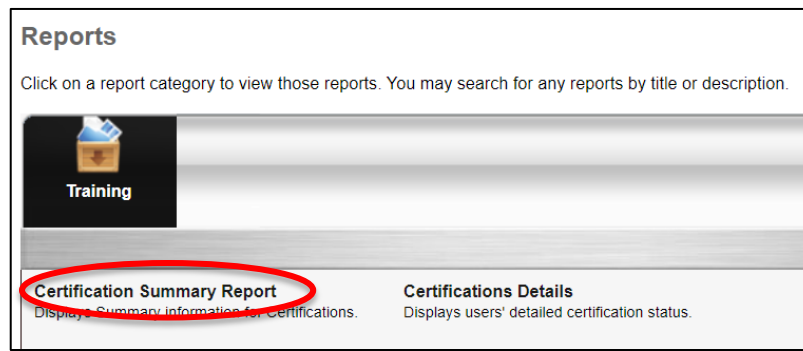
When the report is finished processing, the Administrator can then view the full report in its entirety.

- Up to three (3) separate reports can generate asynchronously, allowing greater flexibility for creating and storing different versions of the report.
- If you process a report or refresh a stored report, the report appears in the table as Queued.
- It is required that you refresh your screen to update the processing status of the report (e.g. from queued to complete).
- The most recently created report displays at the top of the table.
- Since a user can generate up to three (3) reports, the Administrator can define a report title for each of the generated reports.
- Clicking the **View Details** icon changes the report settings on the page to match those of the selected previously run report.

1. From the **Welcome** page, hover over the **Reports** tab and select the **Standard Reports** option from the dropdown list.

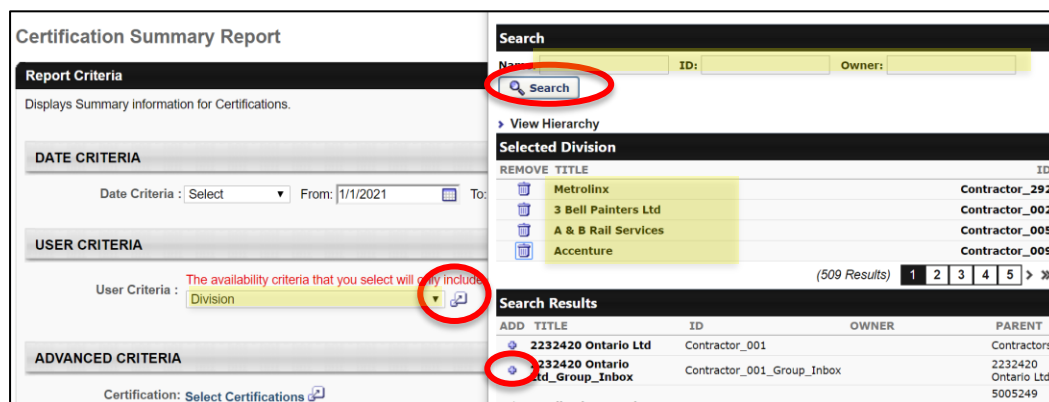



2. In the **Reports** page, click on the **Certification Summary Report** link.

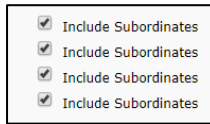


3. **Date Criteria section:** Specify the date criteria, from, and to dates.
4. **User Criteria:** Specify more detailed criteria for your report.
 - **User Criteria:** Click on the dropdown list to select your criteria. Once the criteria is selected (e.g. Division),
 - Specify further details for your selection by clicking on the **Expand** icon. Search and locate your Division/company by entering information in the filter boxes and clicking on the **Search** button or using the expand icons to search.
 - Click on the **Add** button beside the result title to apply it.

Please note: Multiple criteria selections can be added to one report.

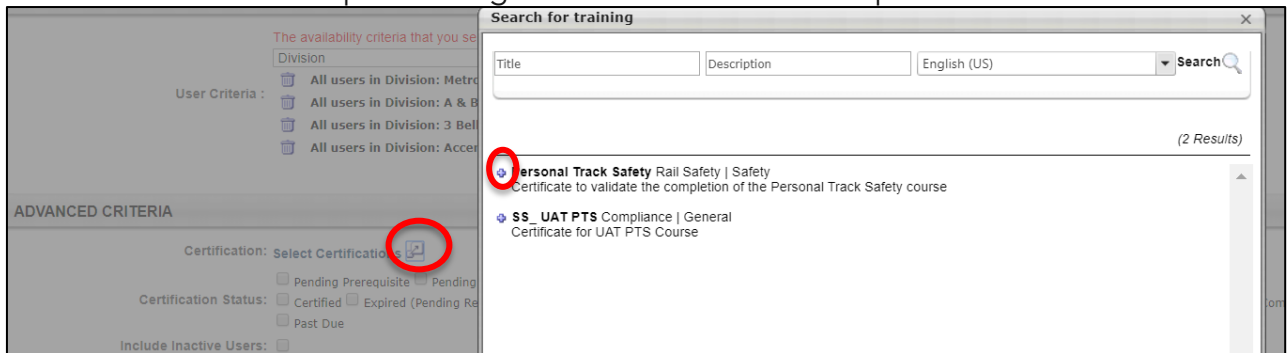


- Click on the **Done** button to apply your selections. 
- Unselect the checkboxes if you do not want to include subordinate criteria from the master criteria selected.

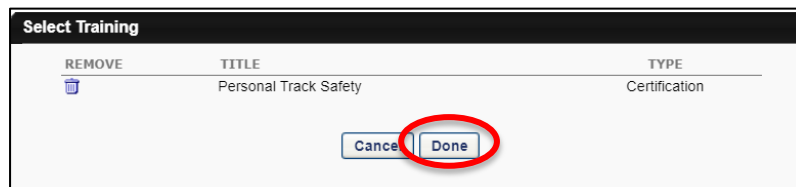


5. **Advanced Criteria:** Specify what criteria information you want pulled into the report.
 - **Certification:** Click on the **Select Certifications** expand icon, search, and select the training by clicking on the add button beside the training.

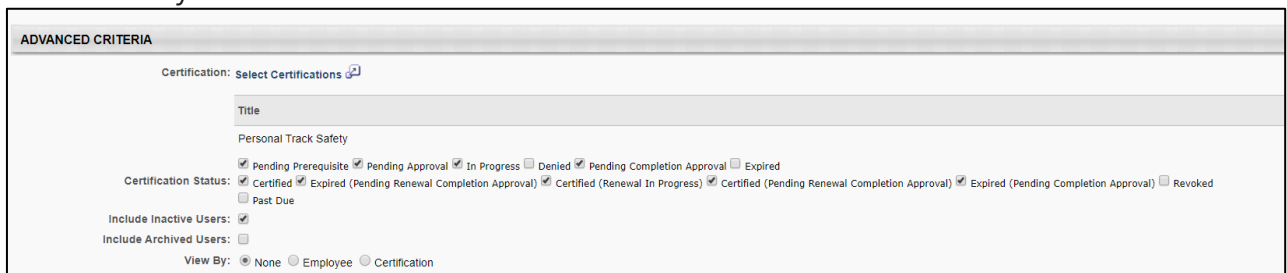
Please note: Multiple trainings can be added to one report.



- Click on the **Done** button to apply the certifications.



- Continue to specify criteria by clicking on the checkboxes and radio buttons: Certification status, include inactive users, include archived users, and view by.




Important to Note: All PTS training certification user records prior to March 2021 are set in the system as "Inactive Users" since they have completed the PTS certification. Ensure

the “Include Inactive Users” checkbox is selected to capture all historic user PTS certifications.

6. **Process Report:** Enter the title for the report and click on the **Process Report** link. If not report title is entered, the title of the report will default to Certification Summary Report.

PROCESS REPORT










Report Title:
(If no report title is entered, the title of the report will default to Certification Summary Report)





 **Process Report**

View Reports

All processing and processed reports display at the bottom of the page under the Processed Reports section. This is where you can view the reports processing status, access the report, view the report details, and delete the report.

Click on the corresponding icon to perform the function.

Processed Reports				
Report Name	Create Date	Last Run	Output	Options
Contractors PTS Completion Report	01/22/2021	Never		Queued 
Certification Summary Report	01/13/2021	01/13/2021		  
Certification Summary Report	01/13/2021	01/13/2021		  

-  Export the report in the indicated output format.
-  Refresh report.
-  View details of the report.
- Queued Report is in the queue.
-  Delete report.

Report Output Examples

Output not grouped

Name	User ID	Division	Location	Cost Center	Certification Title	Version	Current Status	Valid Until	Certification Period Title	Credits required for Completion
Jamie Anderson	janderson	sales	santa monica	sales	How to be a good sales person	1	Certified	10/20/2011	Renewal Period 2	0
Jamie Anderson	janderson	sales	santa monica	sales	How to be a good sales person 2	1	In Progress	N/A	Initial Period	11
Joe Le	jle	sales	santa monica	sales	How to be a good sales person	2	Expired	10/20/2009	Renewal Period 1	10
Usa Poon	lpoon	Care	New York	care	Customer Service	1	Expired	1/1/2009	Initial Period	13
Tina Smith	tsmith	Product Management	New York	Product Management	Product Design 123	2	Certified (Renewal In Progress)	11/22/2011	Renewal Period 2	15

Output grouped by Employee

Certification Title: How to be a good sales person										
Name	User ID	Division	Location	Cost Center	Version	Current Status	Valid Until	Certification Period Title	Credits required for Completion	
Jamie Anderson	janderson	sales	santa monica	sales	1	Certified	10/20/2011	Renewal Period 2	0	
Joe Le	jle	sales	santa monica	sales	2	Expired	10/20/2009	Renewal Period 1	10	
Certification Title: How to be a good sales person 2										
Name	User ID	Division	Location	Cost Center	Version	Current Status	Valid Until	Certification Period Title	Credits required for Completion	
Jamie Anderson	janderson	sales	santa monica	sales	1	In Progress	N/A	Initial Period	11	
Certification Title: Product Design 123										

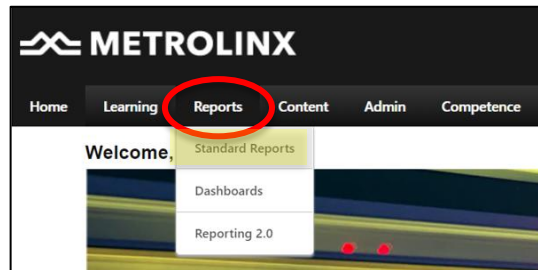
Output grouped by Certification

User: Jamie Anderson, User ID: janderson		Division: Sales	Location: Santa Monica	Cost Center: Sales	Certification	Credits required for Completion
Certification Title	Version	Current Status	Valid Until	Period Title	Completion	
How to be a good sales person	1	Certified	10/20/2011	Renewal Period 2	0	
How to be a good sales person 2	1	In Progress	N/A	Initial Period	11	
User: Joe Le, User ID: Jle		Division: Sales	Location: Santa Monica	Cost Center: Sales	Certification	Credits required for Completion
Certification Title	Version	Current Status	Valid Until	Period Title	Completion	
How to be a good sales person	2	Expired	10/20/2009	Renewal Period 1	10	

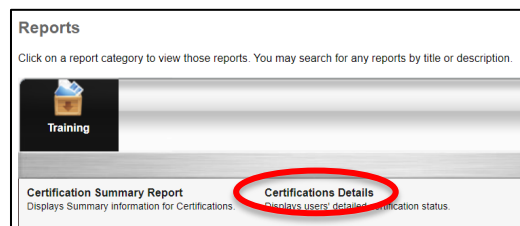
Certification Details Report

This report displays users' progress for each learning object within a certification.

1. From the **Welcome** page, hover over the **Reports** tab and select the **Standard Reports** option from the dropdown list.

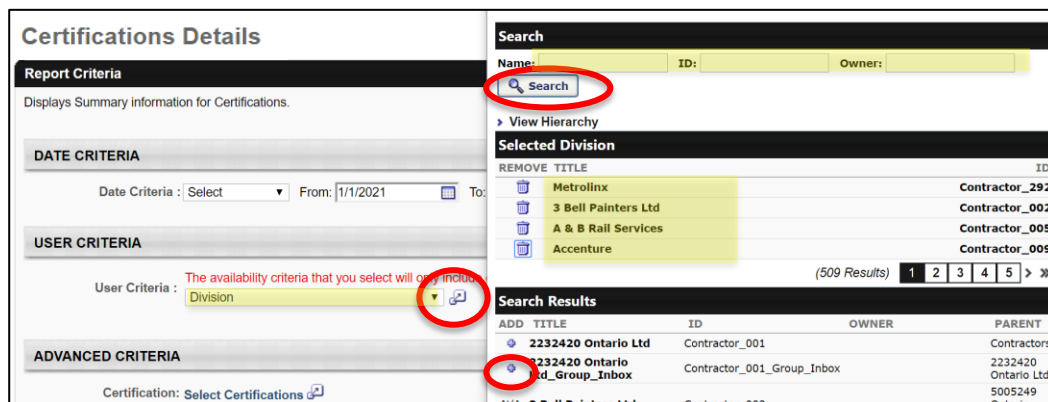


2. In the **Reports** page, click on the **Certifications Details** link.

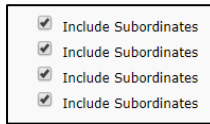


3. **User Criteria:** Specify more detailed criteria for your report.
 - Click on the dropdown list to select your criteria. Once the criteria is selected (e.g. Division),
 - Specify further details for your selection by clicking on the **Expand** icon. Search and locate your Division/company by entering information in the filter boxes and clicking on the **Search** button or using the expand icons to search.
 - Click on the **Add** button beside the result title to apply it.

Please note: Multiple criteria selections can be added to one report.



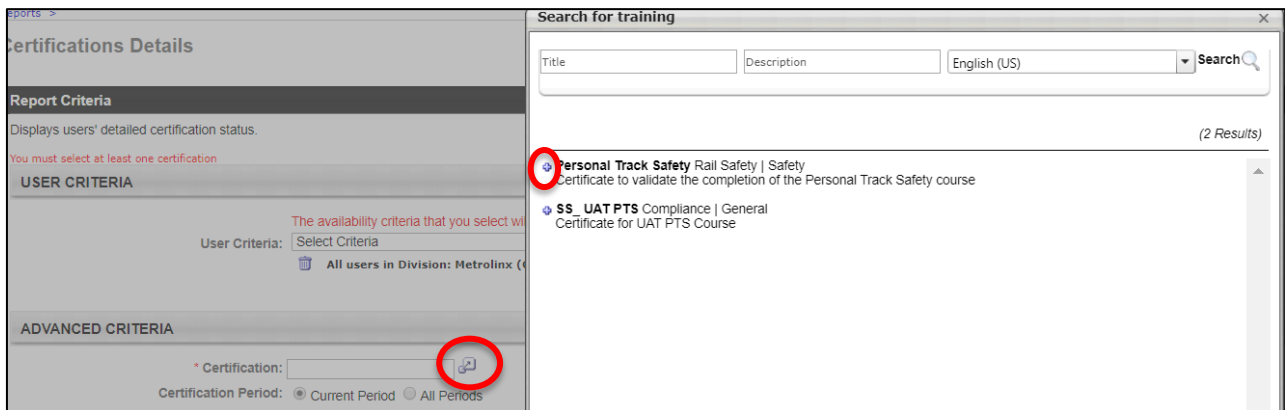
- Click on the **Done** button to apply your selections.
- Unselect the checkboxes if you do not want to include subordinate criteria from the master criteria selected.



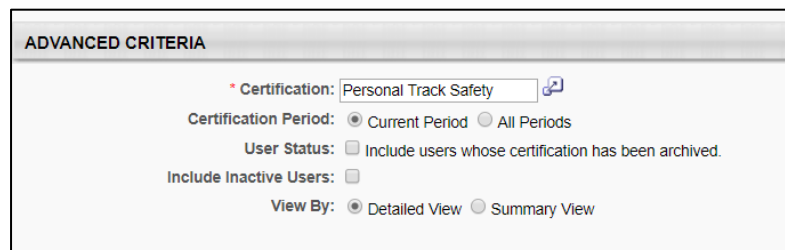
4. **Advanced Criteria:** Specify what criteria information you want pulled into the report.

- **Certification:** Click on the **Certification** expand icon, search, and select the training by clicking on the add button beside the training.

Please note: Only one (1) training can be added to the report.



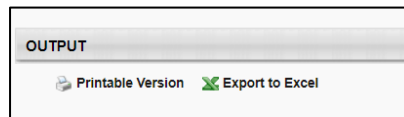
- **Certification Period:** Specify the certification period by click on the radio button for either **Current Period** or **All Periods**. All periods include training from all past certification periods. If this option is not selected, only training from the current certification period is displayed.
- **User Status:** Click the checkbox if you want to include users whose certification has been archived.
- **Include Inactive Users:** Click the checkbox if you want to include all inactive user's certifications in the report.
- **View by:** Define whether you would like to see the certification information in a detailed format or as at the summary level.



- Continue to specify criteria by clicking on the checkboxes and radio buttons: Certification period, user status, include inactive users, and view by.

Important to Note: All PTS training certification user records prior to March 2021 are set in the system as "Inactive Users" since they have completed the PTS certification. Ensure the "Include Inactive Users" checkbox is selected to capture all historic user PTS certifications.

- Choose the output to how you would like to export the information by clicking on the link. You can print the report or export it to Excel.



Report Output Examples

Printed Report

Note: The pie chart appears in the printable version, but does not appear in the Excel output.

Certification Detailed Report
Personal Track Safety

A pie chart with a legend. The legend shows a yellow circle for 'In Progress' and a green circle for 'Certified'. The chart shows a large yellow slice representing 93.6% and a small green slice representing 6.4%.

Certification Status	Number Of Users
In Progress	88
Certified	6

Satgunam, Saraniya(Saraniya.Satgunam)-[Metrolinx] Division, [] Location

Period Title	Three Year Renewal		
Due Date	N/A		
Period Expiration Date	1/13/2024		
<u>Completed Training</u>	<u>Type</u>	<u>Section</u>	<u>Date Completed</u>
Incomplete Training	Type	Section	Training Status
Personal Track Safety	Event	PTS Course	Approved
Period Required Credit	2.00		
Total Acquired Credit	0.00		
Certification Status	In Progress		

Dixon, Jason(Jason.Dixon)-[Metrolinx] Division, [] Location

Period Title	Three Year Renewal		
Due Date	N/A		
Period Expiration Date	1/13/2024		
<u>Completed Training</u>	<u>Type</u>	<u>Section</u>	<u>Date Completed</u>
Personal Track Safety	Event	PTS Course	1/14/2021
Incomplete Training	Type	Section	Training Status

Excel Output

Certification Detailed Report				
Personal Track Safety				
			Certification Status	Number Of Users
			In Progress	88
			Certified	6
Satgunam,Saraniya(Saraniya.Satgunam)-[Metrolinx] Division, [] Location				
Period Title	Three Year Renewal			
Due Date	N/A			
Period Expiration Date	1/13/2024			
<u>Completed Training</u>	<u>Type</u>	<u>Section</u>	<u>Date Completed</u>	<u>Credits Acquired</u>
<u>Incomplete Training</u>	<u>Type</u>	<u>Section</u>	<u>Training Status</u>	
Personal Track Safety	Event	PTS Course	Approved	
Period Required Credit	2			
Total Acquired Credit	0			
Certification Status	In Progress			