Reports

Learning Not Completed Detail by Hierarchy for Administrator

This report may be used to see who still has enrolled status for historical sessions, who is enrolled in or waitlisted for future sessions, and who has "Required" training on his/her to-do list (for example, training that has been identified as an objective as part of an individual development plan or training the individual has requested to be scheduled at his/her local Regional Training Center).

From the Main Menu:

- Click on **Reports**
- On the resulting screen, click on **Learning Not Completed Detail by Hierarchy for Administrator**.
- **Primary Sort Options** (optional):
  - Sort Option 1: If desired, click in the field and select desired primary sort option.
- **Secondary Sort Options** (optional):
  - Sort Option 1: If desired, click in the field and select desired option.
  - Sort Option 2: If desired, click in the field and select desired option.
- **History Criteria** (optional)
  - First Targeted Completion Date: If desired, type or use the calendar icon to assign the first date in a date range, or click in the field then click on the x to remove the default date assignment.
  - Last Targeted Completion Date: If desired, type or use the calendar icon to assign the last date of a date range, or click in the field then click on the x to remove the default date assignment.
- **Learning Criteria** (optional)
  - Learning Title: If desired, type all or part of a learning title. (Acceptable wildcard characters are* and %)
  - Learning Local Code: If desired, type all or part of a learning local code. (Acceptable wildcard characters are* and %)
  - Learning Revision: **LEAVE THIS FIELD BLANK**
  - Provider Organization Local Code: **LEAVE THIS FIELD BLANK**
- **Person Criteria** (optional)
  - Person ID: **LEAVE THIS FIELD BLANK**
  - Login ID: If desired, type an individual's login ID into this field.
  - Local Person ID: **LEAVE THIS FIELD BLANK**
  - Last Name: If desired, type a last name into this field. (Acceptable wildcard characters are* and %)
  - First Name: If desired, type a first name into this field. (Acceptable wildcard characters are* and %)

IMPORTANT NOTE: If <u>any</u> of the optional information contains an error of any kind, the report will return no results; so type carefully and use wildcards (* and %) if necessary.

- **Hierarchy Criteria**
  - Person Hierarchy *: Click on the magnifying glass icon ; click on yellow folder icons to reveal lower levels of the OCWTP hierarchy; then click on the blue underlined hierarchical level to select it.
  - Person Hierarchy Operator: Click in this field and select the desired operator – generally you'll select **At and all levels below this level**.
  - Export Format: For best results, click in this field and select **Adobe Acrobat (PDF)**.
- **Run Report**
- You may be asked if you want to Open or Save the document. Select Open .