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| OMES logo. | Supervisor Reporting Video Transcript |

Linda: Welcome to another learn quick bit video. I'm Linda and [I'm Tom] and we're from OMES.

Linda: This video is going to look at the management reports under the supervisor control panel. The first thing you need to do is navigate to your state of Oklahoma Learn center and go to the tab called supervisor control panel [on the left side of the screen on the links tab list] and select it. The team monitor page will open up. Tom, where do we go from here from here?

Tom: From here, we're going to go over to the right side of the screen. You'll see an icon that, when you hover over, it says management reports [mouse hovers over icon to the right above the employee list]. We'll click on that.

Linda: The window will change and you are now in the BI or business intelligence reporting area. From here, we're able to look at both custom and standard reports. Tom, what's the difference between the two reports?

Tom: Well, a standard report is built into the system. It will pull data from a predefined set of fields that have already been programmed. A custom report is any standard report to which you have made at least one modification and then run it. Once you make a modification to even one single field, that different now becomes a custom report.

Linda: So, from this page, we can see a list of reports and there are actually four standard reports. The first one is a course list report, and it's a list of courses from the learn center. The course report is a list of student progress. The enrollment report is a summary of enrollment progress, and the Oracle learning plan status report is a progress report on the learning plans assigned to your users.

Linda: So one of the things that Tom just did is he clicked on types to change from standard to custom. Why is that helpful Tom?

Tom: Well, the first reason I did it was so that our users would have a nice clear list of only those four standard reports that you were just describing. There is another relationship here that we do want to point out. If you look at the folder list over here [points to left hand filter area], you can see that the top two reports list in the courses/classes folder. The enrollment report, that's listed in the enrollments folder. The Oracle learning plan status report is listed in the advanced Learning folder. If I go back over to the left and also select custom for types of reports, you will see some custom reports come up. You'll also notice that those live in a different folder called my reports. Any custom report that you create in the system goes to that my reports folder.

Linda: Alright, so we know what reports we have. How do I look at a report that I've created?

Tom: Well, if you look at the last run column, not only will this tell you the last date and time that that report was generated, if you click on the link, it will download a report that you can instantly view.

Linda: Alright, so why don't we look at enrollment report?

Tom: We'll click on that last run link. If you look at the bottom left corner you'll see that the browser just downloaded the file. I'll click the up arrow, select open and there's our enrollment report.

Linda: Wow, and now I can edit it because we did it in Excel. I could actually manipulate the data in the Excel spreadsheet, couldn't I?

Tom: Yes you could.

Linda: Alright, so let's close that report. We know that we can look at reports that we've already run. We know where they're housed within the system. There's some other icons and another column, so Tom, explain to me what the status column is?

Tom: Status, you see we've got this little alarm clock looking thing here [points to an alarm clock in the column called status next to the enrollment report]. Hopefully you all remember those alarm clocks. They tells you that a particular report, the enrollment report, is scheduled to be generated by the system on a certain basis, whether it be time, recurrence, or so forth.

Linda: So it's an automated report.

Tom: yes. It will automatically run provided that you come over to this actions column and schedule it.

Linda: Alright, so I can see in my last run report. Is there a way for me to view other reports I've run of the same report?

Tom: There is. You can also go to that actions column and select view history. Here for this report [Enrollment Report], you can see we've got several.

Linda: Alright, so it's got a last run a starred execution time and an expiration date. Does that mean the reports will expire after so many days?

Tom: It does, it's 90 days. However that won't happen without you knowing about it because the system will actually generate a message that tells you that that report is about to expire and you can also see what kind of files you've created.

Linda: So from the same report, these are all the same reports we've generated, both Excel and PDFs. These are called runs, so if we wanted to, we could delete individual runs of a report couldn't we?

Tom: Yes, we could.

Linda: There's a delete button there. If we wanted to rerun the report, all we have to do is click on the title of the report under last run requested, right?

Tom: Correct.

Linda: Alright, so that's how to view reports. Let's click on the back to the reports button, and now we're back in our list of reports. We've decided which is custom which is standard. What we're actually going to do right now is build one standard report and then build a custom report. Alright, so Tom, which standard report do you want to build?

Tom: I like the enrollment report.

Linda: Alright, let's run that.

Tom: I'll click on enrollment report and that brings us to this menu with four tabs across the top starting with the users tab.

Linda: Okay, under the users tab, this is where you're going to say who the report is about. Like who it is going to include. In this case, because we have very little data in the system right now we're going to select as much data as we can. So I want to look at all users who have been approved, denied, pending, and removed. Tom's going to make sure all those fields are clicked at the top. Now I could choose an individual user or a specific group if I wanted to, but for now, I think we're happy with that result.

Linda: Alright, so the next tab is called parameters. Tell us about that Tom.

Tom: Parameters are where you have multiple types of data on the left side and this is where you're going to tell the system to look for that data. [Two column selection panels are visible, items moved from the left side to the right side using buttons in the center].You can move items back and forth using these add and delete buttons in the middle. For example, the first field here is learn centers. Let's say I don't have any users that belong to the Department of Transportation, so I'm going to click delete put that back over here. I do not want the system to look at that. And you can do that for each of these fields. Now there is a checkbox that's very important here. In this particular report, since this is the enrollment report, it says report on all enrollments. If you wanted to delete enrollments from this report, or add only certain ones, you would do that with these buttons. We are going to leave that box checked.

Linda: Down at the bottom, you can choose the different statuses of your enrollments and different types of enrollments. We are going to leave it as it was when we last came in the system. We want to make sure at completion status, we include everybody.

Tom: Then, last but not least, we can make a selection from a start and end date range if so desired. We're just going to run it because it's a new system and it won't take too long. However, if you had been using the system for five years or so, unless you put a start and end date range, your system could take quite a while to build.

Linda: Absolutely, so let's click next, or Tom likes to click on the tabs, [laughter] but there is a next button. Ok, so now we're in fields. Fields is a little bit unusual. A standard report has default fields so that means the fields have already been selected for you so we don't really have to make any changes here. If we were, by taking the check mark off of the default fields, it would automatically think it's going to be a custom report. For the purposes of this one, we're going to leave it as a default and now we're going to move right to output.

Linda: In the output, we have two kinds of data sets standard or sample. A sample lets us take a portion of our data instead of using all of it, and that's good when you have lots of data and you only want to do a statistical analysis. We have output formats. We just ran a report that was an Excel spreadsheet but we also have PDF. We have comma separated values, we have RTF, rich text or HTML, depending on how you're going to use the data determines which output you select.

Linda: You can choose to have a header or no header. If the reports going to stand alone on its own merits, always include a header. You have a date and time stamp which I think is very useful. And then you get an option to email the report to you or link to you about the report you're running. I think we're ready to run a report.

Tom: I think we are. Go ahead and click build report. You'll see the last run column changes to in progress for the report that you're currently running.

Linda: Now here's an unusual system feature: sometimes the in progress will stay in progress until you refresh the system so we're going to do this by clicking the refresh button in the upper right corner. Notice that a report now shows last run and it has the time it was run. We can click on that title (the time and date). It will download in the lower left corner of your screen. Tom's going to click on open, and open that document up. Now you'll see our report, there’s the information that we just created and we didn't have to do a lot of building did we Tom? That’s because the standard reports has everything in the right place. Let's close that now. We just created a standard report and now we're going to show you how to create a custom report.

Linda: Tom which report do we want to build a custom report with?

Tom: let's use the course report.

Linda: So again, we start just like we did with a standard report, but we're going to click on that course report.

Linda: So we're going to set up our options not much is going to change here. We want to get all the data we can by clicking on all the different types of users. We're going to go to our parameters tab.

Linda: Tom, let's select add all to our learn centers. We want to get all the data again, we want all the courses reported on, and we want the complete and incomplete. Alright now, let's go to the fields tab. Okay now, in the fields tab, this is where we're going to customize our report. I want you to take the checkmark off of use the default fields. When you do that, now it opens up to make some modifications. One thing I want to include in my report is agency name. So Tom find agency name and add it to my report. I want that to be the first field I see in my report so how do we do that?

Tom: We select it and then we click the move up button until it is at the top.

Linda: Alright, and what I also want next after agency name is first name last name. Can you move those up?

Tom: I can.

Linda: I also want to sort by agency name so can you add agency name on the sort order and the bottom column.

Tom: Yes I can. I'll select it and click Add.

Linda: Now can you change it so that it sorts by agency before course name.

Linda: Alright, now we've got to give the report a name because when you create a custom report you have to name it. What are you going to call it Tom?

Tom: I'm going to call this Linda's custom report.

Linda: Alright. When we're done, we go to output tab. I want you to create an Excel spreadsheet. I want a header. I want a date stamp. I want everything as it is and we're ready.

Tom: Click build report. Watch that last run column change to in progress.

Linda: There it is and you'll notice that the reports are in alphabetical order. If I had called this alpha custom report, it would be at the top of the list. It just reorganizes the reports in an alphabetical way. Tom go ahead and click the refresh button in the upper right corner. And now our report is done. Go ahead and open that report. When he clicks on it, it downloads in the lower left corner. Tom is now going to open that report.

Tom: And there it is, Linda's custom report.

Linda: Notice that it's now got agency as the first column and first and last name as the second column and it's sorted by the agency.

Tom: Those Brady family children have been busy.

Linda: They have been.

Linda: So whether I create a custom or a standard report, how do I go about scheduling one?

Tom: Well, you would come over to the actions column. Once again you would click the actions option. Click schedule and that will bring up the same four tabs with an extra one that says schedule.

Linda: Alright, so here in the scheduling we have the choice to schedule a onetime report or a reoccurring report. You can set the reoccurrence from hourly, daily, weekly, monthly to yearly. You can change the type of data. One of the cool things about a scheduled report is that it won't run if the data hasn't changed so you can choose all data or a delta data which means it's looking for a specific change in data before it runs the report. You can set a start and end time, and the start time is set on a 24-hour clock or military time. You can set which hour of the day that you want your report to run. For our purposes on very large reports, late night is the best time to run a report. You set the occurrences. You can set the date time, you can also look at the schedule. So once you've set it up you can determine whether or not that schedule is going to work for you or not. If you set a reoccurrence, you can have an expiration. And, the best part, you don't have to send this file to anyone because you can already add their names so they get a copy of the report when it runs. In this case my boss wanted this monthly report, I just would add her name and she'd get the report when I do. There is one other thing that you have to remember to do when you're on the scheduling. What do you need to remember to do Tom?

Tom: If you see the Save button, click the Save button.

Linda: Tom, always talks about this now. There is one other unique feature about custom reports versus standard and that is the ability you can delete a custom report. If you created it, you can delete it. Actually another unique thing about custom reports, you can build a custom report from a custom report.

Linda: So you have you have many options here and I really encourage you to get in the system and just play because you're going to find that these reports are going to be very useful to you. That actually completes the management reports part of the supervisor control panel. Tom, once we're done here we close the BI reporting. It takes us back to the team monitor page and from here, if you're done, you can click home or you can sign out. We are now back to the state of Oklahoma Learn Center welcome page. Anything you have to say Tom?

Tom: Until next time, keep on learning.