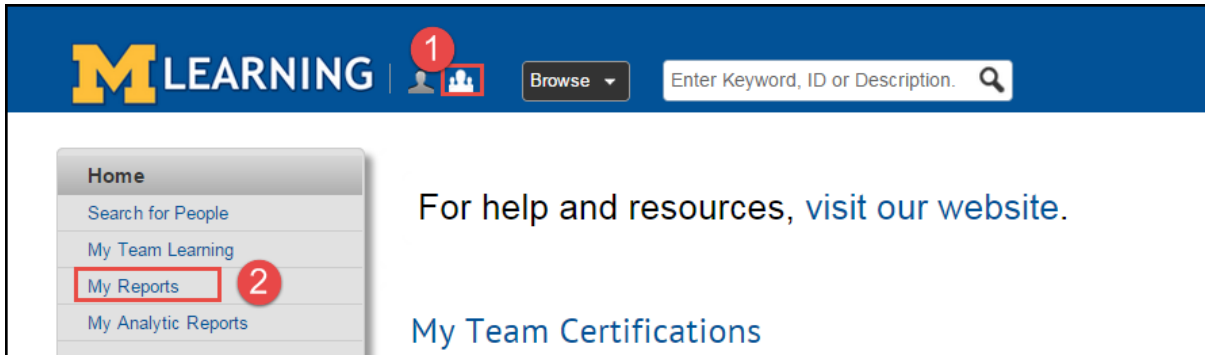


Manager 9: Accessing and Running an Institutional Mandatories (and Other Certifications) Report by Manager

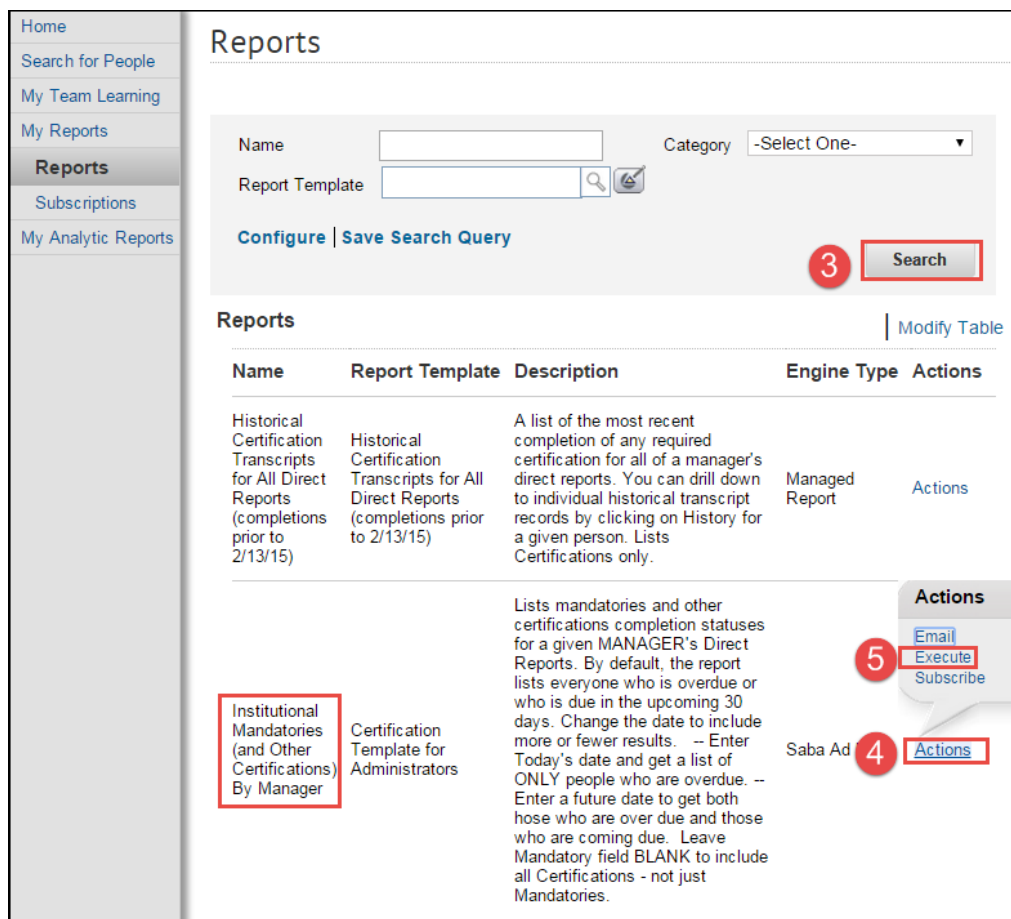
This report returns everyone (by Manager) who is overdue or who is due in the upcoming 30 days.

Access the reports by following this part:

1. **Manager** Icon.
2. **My Reports** left hand navigation to open the **Reports** page.



3. Click the **Search** button.
Note: Currently there are only 2 reports in this section so no need to place search criteria in the fields.
4. Hover over **Actions** next to the **Institutional Mandatories** report.
5. Click **Execute** to enter search parameters and run the report.



Manager 9: Accessing and Running an Institutional Mandatories (and Other Certifications) Report by Manager

6. Enter the Manager's unqiame (required).
7. Optional: Enter the specific Certification name or leave blank to return all mandatories.
8. Click **Generate Report**.

Important: Date defaults to 30 days from the current date. Change the date only if looking for a different date range.

Report Parameters - Institutional Mandatories (and Other Certifications) By Manager

Manager - First Name (Equals)
 Manager - Last Name (Equals)
 Manager - Uniqname (Equals)
6

 Student Certification - Expiration Date (Less Than or Equal)

Certification - Name (Contains)
7

 Certification - Institutional Mandatory (Equals)

8

9. Report generates in plain text form for review.
10. Click the page numbers or next on the report to view all pages.
11. Report can be emailed, printed, or exported to a .CSV file for sorting and filtering (see **Note** below).
12. Note the **Student Certification – Expiration Date**

Institutional Mandatories (and Other Certifications) By Manager 9

Print Export Email 11
10
1 2 Next 13

Person - UMID	Person - First Name	Person - Last Name	Student Certification - Expiration Date	Student Certification - Acquired On	Certification - Name	Certification -	Certification - ID	Organization	Organization - Name
1234567	Richard	Rabbit	03/08/2015 12	04/02/2009	SAFE-C20073 Fire Safety for Non Clinicians in Patient Care Areas	Yes	SAFE-C20073	309612	309612 UMHS Learning Management Svcs

Note: See the job aid **Tips and Tricks for Excel** for instructions on saving to Excel and sorting and filtering the data and emailing the report.