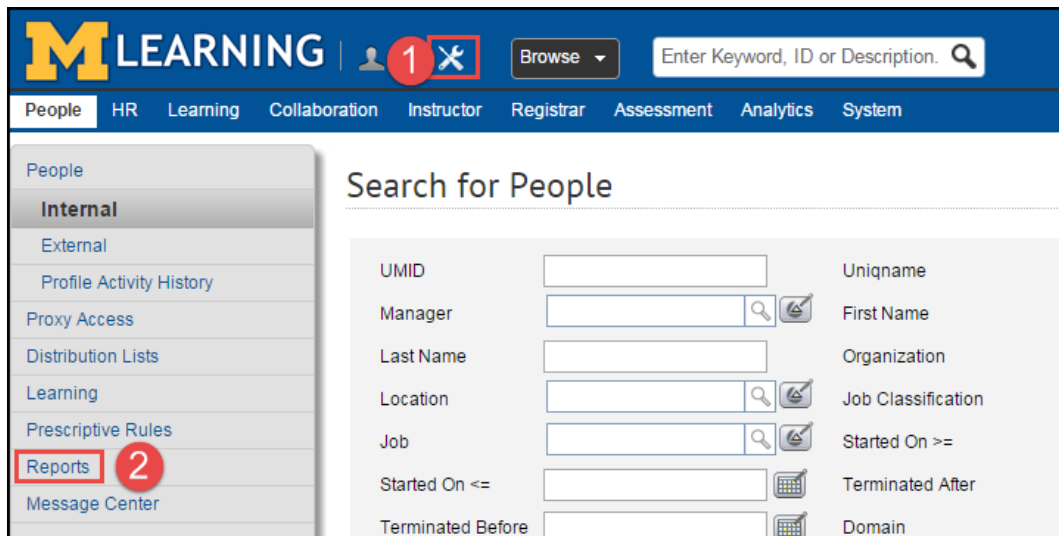


Facilitator: Executing and/or Subscribing to MLearning Ad Hoc Reports

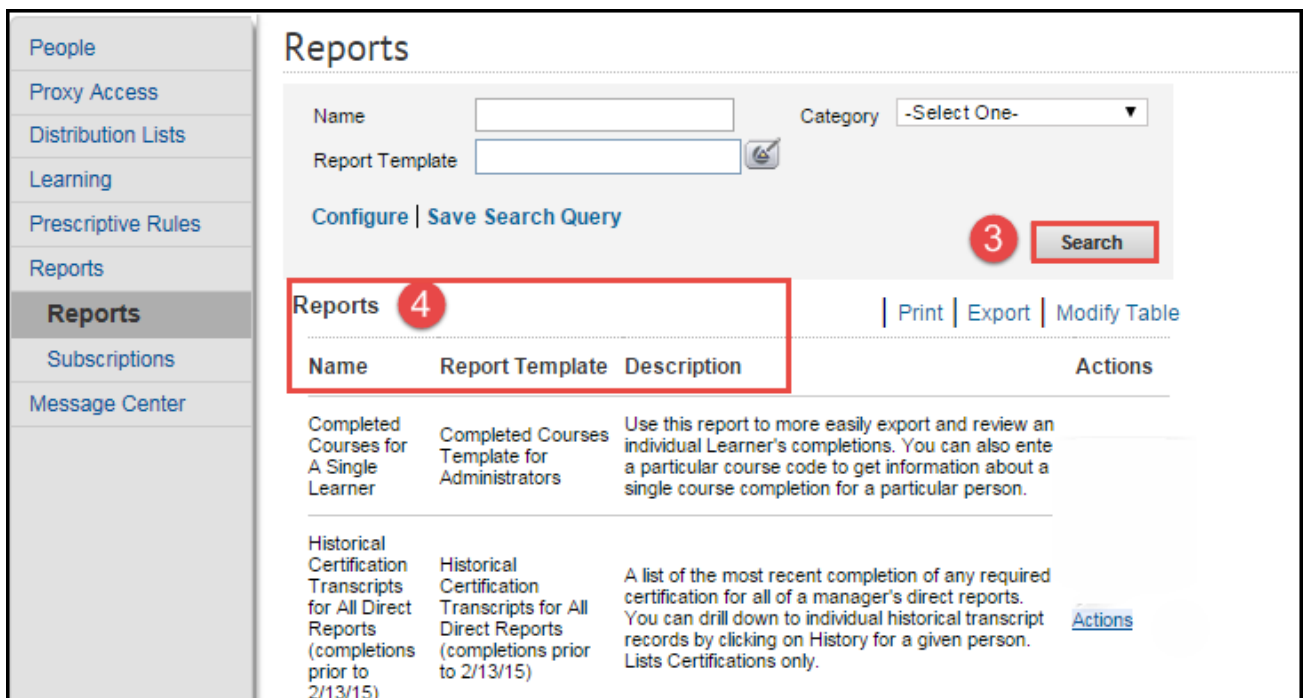
This process describes how to access, execute, print, email and subscribe to reports, and how to edit or delete subscriptions.

Section I: Access the Mlearning Ad Hoc reports.

1. **Administrative** Icon.
2. Click **Reports** in the left hand navigation to open the **Reports** page.



3. Click the **Search** button to result list of current reports.
4. Review **Reports Name** and **Description** to find the needed report.



Facilitator: Executing and/or Subscribing to MLearning Ad Hoc Reports

5. Hover over **Actions** and **click** the action needed:

- **Execute** the report for viewing (See **Section II**)
- **Subscribe** to the report (See **Section III**)
- **Email** current report (See **Section IV**),

Reports		Print Export Modify Table
Name	Description	Actions
Completed Courses for A Single Learner	Use this report to more easily export and review an individual Learner's completions. You can also enter a particular course code to get information about a single course completion for a particular person.	Actions
Historical Certification Transcripts for All Direct Reports (completions prior to 2/13/15)	A list of the most recent completion of any required certification for all of a manager's direct reports. You can drill down to individual historical transcript records by clicking on History for a given person. Lists Certifications only.	<div style="position: relative;"> 5 <div style="border: 1px solid red; padding: 5px; width: fit-content; margin-left: 10px;"> Actions Email Execute Subscribe </div> </div> Actions
Institutional Mandatories (and Other Certifications) By Manager	Lists mandatories and other certifications completion statuses for a given MANAGER's Direct Reports. By default, the report lists everyone who is overdue or who is due in the upcoming 30 days. Change the date to include more or fewer results. -- Enter Today's date and get a list of ONLY people who are overdue. -- Enter a future date to get both those who are over due and those who are coming due. Leave Mandatory field BLANK to include all Certifications - not just Mandatories.	Actions
List of Mandatories by Organization that Expire Before the Entered Date. Default Date is Today Plus 30 Days.	1. Enter a date 2. Report lists ALL people who have one or more mandatory or required activity that is due BEFORE the entered date 3. Enter a date that is in the far future to get a list of EVERYONE and Every mandatory expiration date 4. Remove the word Yes in the last filter to get ALL required Certifications (mandatories & non-mandatories) Default: report lists only those mandatories that either are expired or will expire within the next 30 days. Report includes Child Organizations.	Actions

Section II: Executing the Report

Note: Use this feature for a one time view or to determine if the results meet needs prior to **Subscribing**, or **Emailing**, the report.

5. Click **Execute**.
6. Enter the **Search Parameters**.

Note: Depending on the report, the search parameters may differ – **See next page**.

Search parameters for a report could include:

- Learner Uniquename
- Manager Uniquename (use field to limit results when not required)
- Organization Code
- Course or Certification Code (ID)
- Course or Certification Title

7. Click **Generate Report** and review report results.

Note: The report results in plain text form.

8. Click the **Page Numbers** or **Next** to view all pages.

Section III: Printing the Report

9. Click **Print** in the upper left hand corner **of the report** and follow “print” prompts.

Institutional Mandatories (and Other Certifications) By Manager 7									
<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="display: flex; gap: 10px;"> Print 9 Export Email </div> <div style="text-align: right;"> 8 12 Next </div> </div>									
Person - UMID	Person - First	Person - Last	Student Certification - Expiration	Student Cert - Acquired On	Certification - Name	Certification - Certification -ID	Organization	Organization - Name	
1234567	Richard	Rabbit	03/08/2015	04/02/2009	SAFE-C20073 Fire Safety for Non Clinicians in Patient Care Areas	Yes	SAFE-C20073	309612	309612 UMHS Learning Management Svcs

Section IV: Exporting and Saving the Report

10. Click **Export** in the upper left hand corner **of the report** to export the file in .csv format.

11. Save as an **Excel Workbook** for sorting and filtering.

Note: See Job Aid [Excel Tips and Tricks](#) for instructions on saving to Excel and sorting and filtering the data.

Institutional Mandatories (and Other Certifications) By Manager					
<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="display: flex; gap: 10px;"> Print 10 Export Email </div> </div>					
Person - UMID	Person - First	Person - Last	Student Certification - Expiration	Student Cert - Acquired	
1234567	Richard	Rabbit	03/08/2015	04/02/2009	

Section V: Emailing the Report

12. Click **Email** in the upper left hand corner **of the report** to email the report to a recipient.

Important: The report will be sent in text format. For the ability to sort and filter, the report needs to be exported and saved prior to emailing. See **Section IV: Exporting and Saving the Report**.

Institutional Mandatories (and Other Certifications) By Manager

Print | Export | **Email** 12

Person - UMID	Person - First	Person - Last	Student Certification - Expiration	Student Cert - Acquired
1234567	Richard	Rabbit	03/08/2015	04/02/2009

Section VI: Subscribing to the Report.

13. Access the **Subscribe** link from the main **Reports** page following steps in **Section I**.

14. Hover over **Actions**.

15. Click **Subscribe** (as described in **Step 5**).

Reports | Print | Export | Modify Table

Name	Description	Actions
Historical Certification Transcripts for All Direct Reports (completions prior to 2/13/15)	A list of the most recent completion of any required certification for all of a manager's direct reports. You can drill down to individual historical transcript records by clicking on History for a given person. Lists Certifications only.	Actions
Institutional Mandatories (and Other Certifications) By Manager	Lists mandatories and other certifications completion statuses for a given MANAGER's Direct Reports. By default, the report lists everyone who is overdue or who is due in the upcoming 30 days. Change the date to include more or fewer results. -- Enter Today's date and get a list of ONLY people who are overdue. -- Enter a future date to get both those who are over due and those who are coming due. Leave Mandatory field BLANK to include all Certifications - not just Mandatories.	Actions Email Execute Subscribe 15

16. Click **New Report Subscription** on the **Report Subscription** page.

17. Complete the **Report Subscription** form as noted.

Report Subscription for Institutional Mandatories (and Other Certifications) By Manager

Run Reports > Report Subscri... > Report Subscri...

Name* Institutional Mandatory Report
Description* B Eckstein staff overdue or due in the

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

Manager - Uniquname (Equals)* beckstei

Student Certification - Expiration Date (Less Than or Equal) Number of days after the date on which report is run
 Enter Number of Days 30

Certification - Name (Contains)
 Certification - Institutional Mandatory (Equals) Yes

To* ddemeest@med.umich.edu

Subject* Institutional Mandatories (and Other C
Mail Text* Compare against last months report

Occurs Daily Weekly Monthly
 Occurs Monthly Every* 1 month(s) On* 1 day of the month

Frequency Once Every 1 Hour(s)

Frequency-Once Start Time* 7 : 00 A.M. P.M.
 Start Date* 03/01/2015

18 Preview Report Save Cancel

Annotations:

- Give the report a name and a short description.
- Enter all required fields - for example: manager unickname
- Enter the email of the report recipient
- Enter an email text - for example: describe what to do with the report
- Enter the frequency of receipt
- Enter the date and time to begin

18. Click **Save**.

Note: Report arrives by email at the addresses noted in the form and at the time/date noted..

Section VII: Editing or Deleting Subscribed Reports

19. Open the **Reports** page and click **Subscriptions** in the left hand navigation.

20. Hover over the **Actions** link next to the report.

21. Click **Edit** to edit the **Report Subscription** form.

22. Click **Delete** to unsubscribe.

The screenshot displays the MLearning interface for managing report subscriptions. On the left, a navigation sidebar lists various categories, with 'Subscriptions' highlighted and marked with a red circle and the number 19. The main content area is titled 'Report Subscriptions' and features a table with the following data:

Report Name	Subscription
Institutional Mandatories (and Other Certifications) By Manager	Institutional Mandate Report

To the right of the table, an 'Actions' menu is visible, containing 'Edit' and 'Delete' buttons, both marked with red circles and the number 21. The 'Delete' button is also marked with a red circle and the number 22. The 'Institutional Mandate Report' entry in the table is marked with a red circle and the number 20, and an 'Actions' button is located below it.

23. Refer to Job Aid **Using Ad hoc Reports** for further information on each report