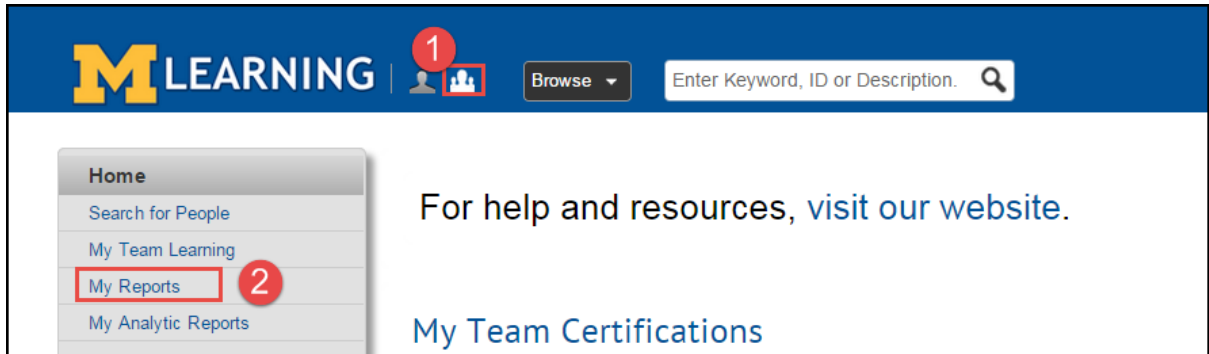


## Manager: Executing and/or Subscribing to MLearning Ad Hoc Reports

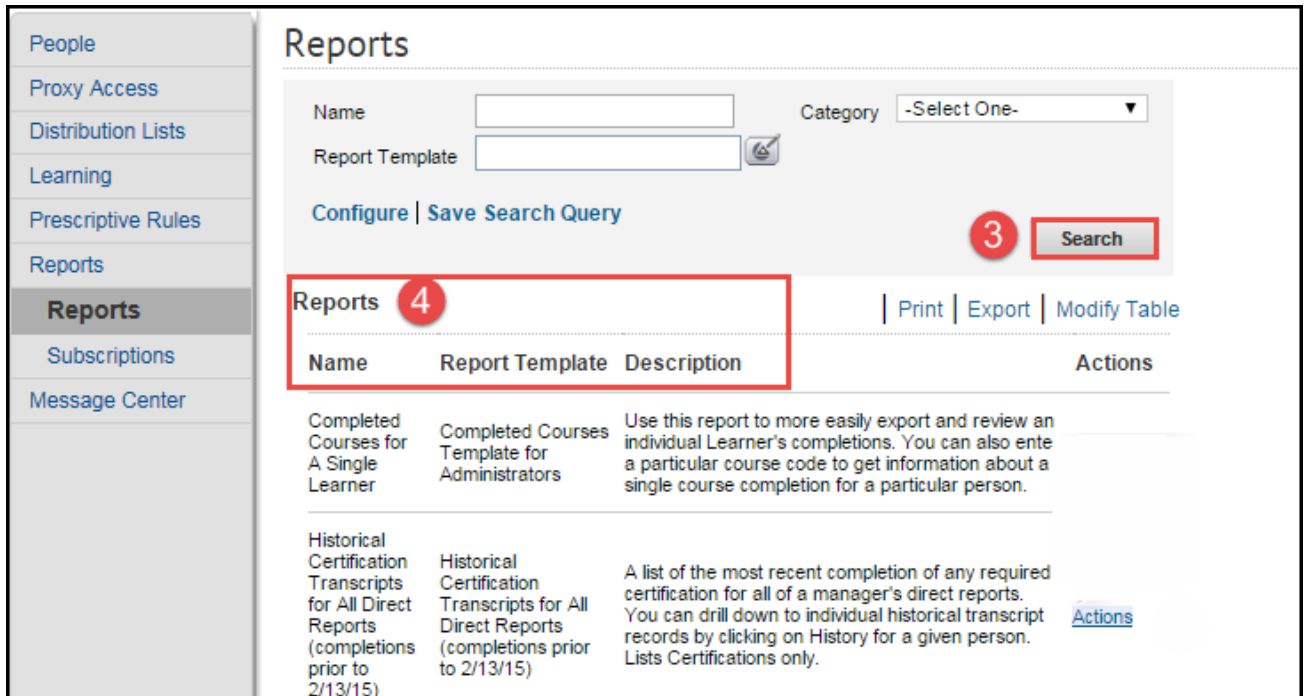
This process describes how to access, execute, print, email and subscribe to reports, and how to edit or delete subscriptions.

### Section I: Access the MLearning Ad Hoc reports.

1. **Manager** Icon.
2. Click **My 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.



## Manager: 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		<a href="#">Print</a>   <a href="#">Export</a>   <a href="#">Modify Table</a>
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.	<a href="#">Actions</a>
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.	<a href="#">Actions</a>
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 <b>ONLY</b> 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.	<a href="#">Actions</a>
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.	<a href="#">Actions</a>

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**Actions**  
[Email](#)  
[Execute](#)  
[Subscribe](#)

### 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**.

**Manager: Executing and/or Subscribing to MLearning Ad Hoc Reports**

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

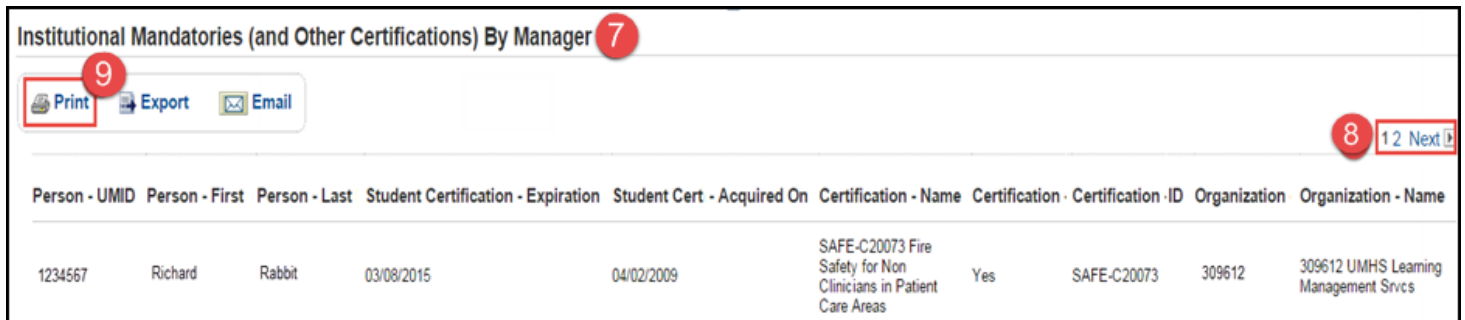
7. Click **Generate Report** to view **Selected Report** results.

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**

**9** Print Export Email **8** 1 2 Next

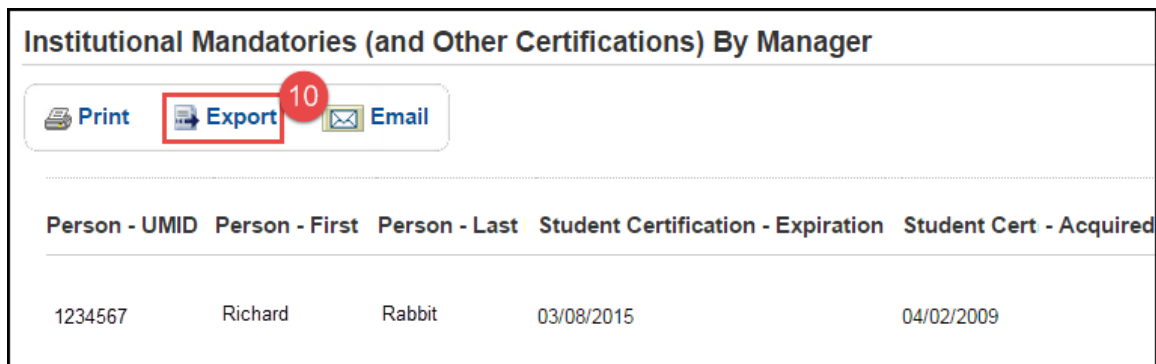
Person - UMID	Person - First	Person - Last	Student Certification - Expiration	Student Cert - Acquired On	Certification - Name	Certification -	Certification -ID	Organization	Organization - Name
1234567	Richard	Rabbit	03/08/2015	04/02/2009	SAFE-C20073 Fire Safety for Non Clinicians in Patient Care Areas	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

Print **10** Export Email

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


## Manager: Executing and/or Subscribing to MLearning Ad Hoc Reports

### 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

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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.	<div style="border: 1px solid gray; border-radius: 10px; padding: 5px; background-color: #f0f0f0;"> <p style="text-align: center; margin: 0;">Actions</p> <p style="text-align: center; margin: 0;"><b>Actions</b></p> <p style="text-align: center; margin: 0;"> <a href="#">Email</a>  <a href="#">Execute</a>  <span style="border: 1px solid red; padding: 2px;">Subscribe</span> </p> <p style="text-align: center; margin: 0;"><a href="#">Actions</a></p> </div>
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.	

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

## Manager: Executing and/or Subscribing to MLearning Ad Hoc Reports

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	← Give the report a name and a short description.
Description*	B Eckstein staff overdue or due in the	
Manager - First Name (Equals)	<input type="text"/>	
Manager - Last Name (Equals)	<input type="text"/>	
Manager - Uniqname (Equals)*	beckstei	← Enter all required fields - for example: manager unickname
Student Certification - Expiration Date (Less Than or Equal)	Number of days after the date on which report is run	
	Enter Number of Days <input type="text" value="30"/>	
Certification - Name (Contains)	<input type="text"/>	
Certification - Institutional Mandatory (Equals)	<input type="text" value="Yes"/>	
To*	ddemeest@med.umich.edu	← Enter the email of the report recipient
	Character Limit:255	
Subject*	Institutional Mandatories (and Other C	← Enter an email text - for example: describe what to do with the report
Mail Text*	Compare against last months report	
	Character Limit:255	
Occurs <input type="radio"/> Daily <input type="radio"/> Weekly <input checked="" type="radio"/> Monthly Occurs Monthly <input type="radio"/> Every* <input type="text" value="1"/> month(s) <input type="radio"/> On* <input type="text" value="1"/> day of the month		← Enter the frequency of receipt
Frequency <input checked="" type="radio"/> Once <input type="radio"/> Every <input type="text" value="1"/> Hour(s)		
Frequency-Once <input type="text" value="7"/> : <input type="text" value="00"/> <input checked="" type="radio"/> A.M. <input type="radio"/> P.M.		← Enter the date and time to begin
Start Time* <input type="text" value="03/01/2015"/>		
Start Date* <input type="text" value="03/01/2015"/>		

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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.

## Manager: Executing and/or Subscribing to MLearning Ad Hoc Reports

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

22. Click **Delete** to unsubscribe.

The screenshot displays the MLEARNING interface. At the top, there is a navigation bar with the MLEARNING logo, a search bar, and a 'Browse' dropdown menu. Below the navigation bar, there is a horizontal menu with options: People, HR, Learning, Collaboration, Instructor, Registrar, Assessment, Analytics, and System. On the left side, there is a vertical sidebar menu with options: People, Proxy Access, Distribution Lists, Learning, Prescriptive Rules, Reports, and Subscriptions. The 'Subscriptions' option is highlighted with a red box and a red circle containing the number 19. The main content area is titled 'Report Subscriptions'. Below the title, there is a table with two columns: 'Report Name' and 'Subscription'. The first row is 'Institutional Mandatories (and Other Certifications) By Manager'. The second row is 'Institutional Mandate Report'. The 'Institutional Mandate Report' row has an 'Actions' button highlighted with a red box and a red circle containing the number 20. The 'Actions' button has 'Edit' and 'Delete' options, with 'Edit' highlighted by a red box and a red circle containing the number 21, and 'Delete' highlighted by a red box and a red circle containing the number 22.

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