

Hsieh, Patricia

From: Forum for Human Resource trainers [AMS-HRTRAINERS-L@LISTSERV.TAMU.EDU] on behalf of Wuensche, Kristi [wuensche@TAMU.EDU]
Sent: Tuesday, October 28, 2008 2:29 PM
To: AMS-HRTRAINERS-L@LISTSERV.TAMU.EDU
Subject: [AMS-HRTRAINERS-L] TrainTraq Reports
Attachments: instructions.pdf

System Training is pleased to announce that reporting from within TrainTraq has been improved based on member feedback. To preview the new reporting features and functionality, select the following link: <https://apps3.system.tamus.edu/traintraqreports>. You will log on using your Single Sign On account. It will take you directly to the TrainTraq reporting interface. On Friday, November 7th, this reporting capability will be moved to within TrainTraq, and you will not need to access the reports from this direct link. You will be able to select a reporting button in TrainTraq. During the next week, we ask that you please review the reports and provide us with feedback regarding anything you like or anything that you feel needs improving. You will also want to announce the enhancement to reporting to your processors so they can anticipate this change. The existing reports in TrainTraq will remain for now, but will eventually be removed as we anticipate that everyone will prefer the new reports.

The chief advantages of the new reports in TrainTraq:

- **Faster reporting.** The reports for large adlocs or entire workstations are returned very quickly. For example, even large workstations such as TAMU, can run a workstation-wide report within seconds.
- **Multiple courses.** You can run a report containing multiple courses at one time. For example, a processor can run a report on all five system required trainings simultaneously rather than having to run each one separately and combine them manually in Excel. You can choose to access all courses loaded in TrainTraq, System required courses for everyone, and System required courses by job duty. (The last category refers to courses only required of select employees based on job duties including HIPAA for Benefits Processors, HUB Purchasing, Payment Card Industry Data Security Standard, Open Records, Records Retention, etc.)
- **Past Due/Not Past Due filter.** You can sort the assignments by past due or not past due prior to running the report so that you don't have to sort or filter these within Excel. This should assist processors who only want to follow up with employees who are overdue for training, yet it also allows processors who want to be proactive to still notify those with upcoming due dates.
- **Email addresses.** The employee's email is included if you want to send custom email messages to remind your employees of pending or overdue assignments.

Keep in mind that you now have two reporting options with TrainTraq and the Data Warehouse. We have updated the reports in TrainTraq to best accommodate the needs of training processors and restricted processors so that they can more easily access the information they need for their adloc or adlocs. The Data Warehouse is designed for training administrators who may need to access information for their entire workstation to compile management and executive level reports including aggregate data, trends, etc.

We have attached a brief set of instructions on how to use the new reports in TrainTraq. Please let Pat or me know if you have any questions or feedback before we make the reports live in TrainTraq on November 7th.

Kris

Kris Wuensche
Senior Instructional Designer
Office of the Deputy Chancellor
A&M System Building, Suite 1281
200 Technology Way
College Station, TX 77845-3424

Phone: (979) 458-6173 / Fax: (979) 458-6168
E-mail: wuensche@tamu.edu
Web: <http://tamus.edu/offices/training/index.html>

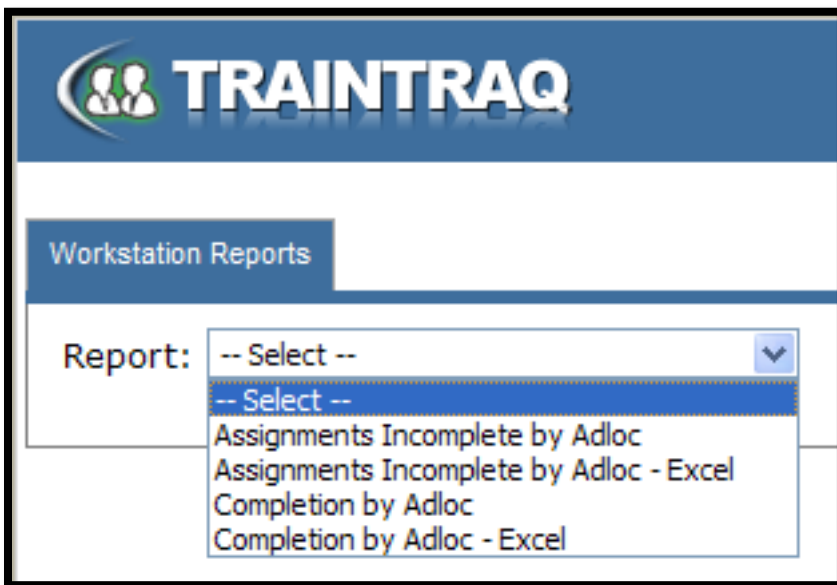
Instructions for using TrainTraq Reports

Reports

1. Assignments Incomplete by Adloc—this report is similar to the previous on screen assignments report.
2. Assignments Incomplete by Adloc-Excel—this report is similar to the previous downloadable assignments report.
3. Completions by Adloc—this report is similar to the previous on screen completions report.
4. Completions by Adloc-Excel—this report is similar to the previous downloadable completions report.

Getting Started

First, you must determine which report you would like to access. The following options exist (see descriptions in previous section):



Assignments Incomplete by Adloc

The screenshot shows a web interface for generating reports. At the top, there is a blue header with the text 'Workstation Reports'. Below this, a 'Report:' label is followed by a dropdown menu currently showing 'Assignments Incomplete by Adloc'. Underneath, there is a light-colored panel containing four filter options, each with a dropdown menu: 'WorkStation' (set to '<Select a Value>'), 'Adloc' (empty), 'Requirement Type' (set to '<Select a Value>'), and 'Past Due' (set to '<Select a Value>').

Workstation

Select your workstation. Once a workstation is selected, an adloc list will automatically populate.

Adloc

Depending on your permissions, you will see the adloc or adlocs you are assigned to monitor or you will see all adlocs for your entire workstation. You need to determine the scope of your report by selecting a single adloc or All. If you have two adlocs, "All" will pull all the data for both adlocs. If you monitor the entire workstation, "All" will pull the data from all adlocs at your workstation.

Requirement Type

You have four options to choose from.

- **All** pulls an aggregate report for all assignments on all courses that you have loaded in TrainTraq. If you have classroom trainings or other online training not designed by the System Offices, these courses will be included in this report (assuming you've used TrainTraq to make assignments for these courses).
- **Required of All Employees** includes assignments from the System required courses that are required of all System employees including Ethics, Creating a Discrimination Free Workplace, Reporting Fraud, Waste and Abuse, Information Security Awareness, and Orientation to the A&M System.
- **Required by Job Duty** includes assignments from the System required courses that are only required of select System employees based on their job duties. Example courses include HIPAA for Benefits Processors, HUB Purchasing, Records Retention, Open Records, and Payment Card Industry Data Security Standard.
- **Not Required** includes assignments from any course that the System Offices created but has not required or any classes that your workstation has created that are not required by the System Offices. (Note: "Requirement," as used here, only refers to a requirement by the System Offices. You may require a training of your employees, but it isn't considered required by TrainTraq).

Instructions for using TrainTraq Reports

Past Due

You cannot run all assignments at once. You must choose to pull either past due assignments or those which are not past due.

View Report

Once you have selected all the applicable values above, select the View Report button. Your report appears on screen.

The screenshot displays the TrainTraq Reports interface. At the top, there are filter dropdowns for WorkStation (S - SAGO), Adloc (-All-), Requirement Type (-All-), and Past Due (Yes). A 'View Report' button is located to the right. Below the filters is a navigation bar with page indicators (1 of 1), a zoom level (100%), and an 'Export' button. The main content area features the 'TrainTraq Reports' title and a 'Parameters' box listing the selected filters. A table below shows assignment details with columns for Adloc/UIN/Name/Email, Course, Current Status, Assigned By, Assigned Date, Date Due, Last Email Date, and Date Last Paid. The table contains two rows of data.

Adloc/UIN/Name/Email	Course	Current Status	Assigned By	Assigned Date	Date Due	Last Email Date	Date Last Paid
0121501(0099002 - Creating a Discrimination-Free Workplace	Not Started	BPP0000	7/31/2008	10/4/2008	9/30/2008	10/24/2008
	0099001 - Ethics	Not Started	BPP0000	7/31/2008	10/4/2008	9/30/2008	10/24/2008

Shows the number of pages in your report

Use arrows to navigate the pages of the report

Allows you to zoom in or out on content to improve legibility on screen

Note: You can download this report to Excel. In the Select a format drop down menu, you may choose from XML, CSV, TIFF, PDF, Web archive and Excel. This download will only include the columns you see above in light blue: Adloc/UIN/Name/Email, Course, Current Status, Assigned By, Assigned Date, Date Due, Last Email Date, and Date Last Paid. For more detail than these columns, see the next report, Assignments Incomplete by Adloc-Excel.

Printing: For best printing results of this report, download to PDF and select print from within Adobe Acrobat.

Instructions for using TrainTraq Reports

Assignments Incomplete by Adloc-Excel

Select all the applicable values as you did in the previous report (Workstation, Adloc, Requirement Type, and Past Due status). Run View Report.

This generates an abbreviated view of the data you are about to download. *Note: Not all columns appear on the screen at 100% zoom. You will need to zoom out on the data or download it to see all the columns.*

UIN	Name	Email Addr	Emp Status	Course ID	Course Title	Adloc Number	Adloc Number Primary	Primary Adloc Name	Part
11111111	Thomas Smith	thomas.smith@university.edu	A	0103001	Information Security Awareness	01271070	Y	Budgets & Accounting	01
11111111	John Doe	john.doe@university.edu	A	0211277	ES Liaison: Leave Policies & Procedures HUMR	01271070	Y	Budgets & Accounting	01
11111111	Jane Doe	jane.doe@university.edu	A	0099003	Reporting Fraud, Waste and Abuse	01215010	N	Board Of Regents	01
11111111	John Doe	john.doe@university.edu	A	0099001	Ethics	01215010	Y	Board Of Regents	01
11111111	John Doe	john.doe@university.edu	A	0099002	Creating a Discrimination-Free Workplace	01215010	N	Board Of Regents	01

You can download this report in several formats. In the Select a format drop down menu, you may choose from XML, CSV, TIFF, PDF, Web archive and Excel.

This report includes the following columns:

UIN, Name, Email Address, Employment Status, Course ID, Course Title, Adloc Number, Adloc Number Primary, Primary Adloc Name, Part, Workstation, Course Status, Assignment Date, Assigned By, Start Date, Complete Date, Due Date, Score CEUs, Contact Hours, SFS Flag, Email Date, Update By, Update Date, Comments, And Last Paid Date.

Printing: For best printing results of this report, download to Excel. Within Excel 2007, select the Page Layout tab, then select the Page Setup dialog box, then select the Sheet tab, and select to repeat Row 1 and Column B. Then print from Excel.

Instructions for using TrainTraq Reports

Completions by Adloc

Workstation

Select your workstation. Once a workstation is selected, adloc data will automatically populate.

Adloc

As with assignments reports, you may choose to pull a report for a single adloc or you may select all adlocs that you monitor. This may include multiple adlocs or all adlocs for a workstation.

Completion Range Start Date/End Date

You need to enter a start and end date for the completions data you wish to pull. Typically users will pull completions for a single day, the last month, or possibly the last year (fiscal or calendar). Enter the dates as appropriate. You may type them in directly or select from the pop up calendar.

Requirement Type

Select the scope of courses you wish to pull into the report. You have the same four options you have with the assignment reports (All, Required of All Employees, Required by Job Duty, and Not Required.)

View Report

As with assignments reports, once all the applicable values have been entered, select the View Report button.

The screenshot shows the TrainTraq Reports interface. At the top, there are several dropdown menus and text boxes for filtering: WorkStation (S - SAGO), Adloc (-All-), Completion Range Start Date (8/22/2008), Completion Range End Date (10/22/2008), and Requirement Type (-All-). A 'View Report' button is visible on the right. Below these is a navigation bar with arrows, a page indicator '1 of 12', a zoom level '100%', and options for 'Find | Next', 'Select a format', and 'Export'. The main content area is titled 'TrainTraq Reports' and 'Completions by Adloc'. A 'Parameters' box on the right lists the current filter settings. A table below shows the report data with columns for Adloc/UID/Name/Email, Date Completed, Score, and Comments. Three callout boxes provide instructions: one pointing to the page indicator ('Shows the number of pages in your report'), one pointing to the navigation arrows ('Use arrows to navigate the pages of the report'), and one pointing to the zoom level ('Allows you to zoom in or out on content to improve legibility on screen').

Adloc/UID/Name/Email	Date Completed	Score	Comments
0099002 - Creating a Discrimination-Free Workplace	8/22/2008	100	Completed On-line Class
0103001 - Information Security Awareness	8/22/2008	100	Completed On-line Class

Note: You can also download this report to Excel. In the Select a format drop down menu, you may choose from XML, CSV, TIFF, PDF, Web archive and Excel. This download will only include the columns you see above in light blue: Adloc, UIN, Name, Email, Course, Date Completed, Score, and Comments.

Printing: For best printing results of this report, download to PDF and select print from within Adobe Acrobat.

Instructions for using TrainTraq Reports

Completions by Adloc-Excel

Select all the applicable values as you did in the previous report (Workstation, Adloc, Requirement Type, and Past Due status). Run View Report.

This generates an abbreviated view of the data you are about to download. *Note: Not all columns appear on the screen at 100% zoom. You will need to zoom out on the data or download it to see all the columns.*

Workstation Reports

Report: Completion by Adloc - Excel

WorkStation: S - SAGO Adloc: -All- View Report

Completion Range Start Date: 8/22/2008 Completion Range End Date: 10/22/2008

Requirement Type: -All-

1 of 6 100% Find | Next Select a format

UIN	Name	Email Addr	Emp Status	Course ID	Course Title	Adloc Number	Adloc Number Primary	Primary Adloc Name	Part
00000011	John Smith	john.smith@unl.edu	A	0103001	Information Security Awareness	01271070	Y	Budgets & Accounting	01
00000008	John Smith	john.smith@unl.edu	A	0103001	Information Security Awareness	01110704	Y	Bus Computing Serv	01
00000017	John Smith	john.smith@unl.edu	A	0099001	Ethics	01271020	Y	B/P/P Operations Ctr	01
00000017	John Smith	john.smith@unl.edu	A	0103001	Information Security Awareness	01271020	Y	B/P/P Operations Ctr	01
00000011	John Smith	john.smith@unl.edu	A	0103001	Information Security Awareness	01271100	Y	Internal Audit	01
00000008	John Smith	john.smith@unl.edu	A	0103001	Information Security Awareness	01271070	Y	Budgets & Accounting	01

You can download this report in several formats. In the Select a format drop down menu, you may choose from XML, CSV, TIFF, PDF, Web archive and Excel.

This report includes the following columns:

UIN, Name, Email Address, Employment Status, Course ID, Course Title, Adloc Number, Adloc Number Primary, Primary Adloc Name, Part, Workstation, Course Status, Assignment Date, Assigned By, Start Date, Complete Date, Due Date, Score CEUs, Contact Hours, SFS Flag, Email Date, Update By, Update Date, Comments, And Last Paid Date.

Printing: For best printing results of this report, download to Excel. Within Excel 2007, select the Page Layout tab, then select the Page Setup dialog box, then select the Sheet tab, and select to repeat Row 1 and Column B. Then print from Excel.