

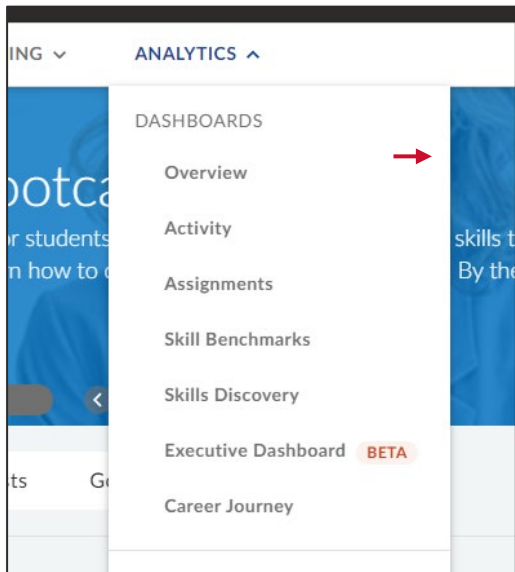
Manager's Guide: Training Reports

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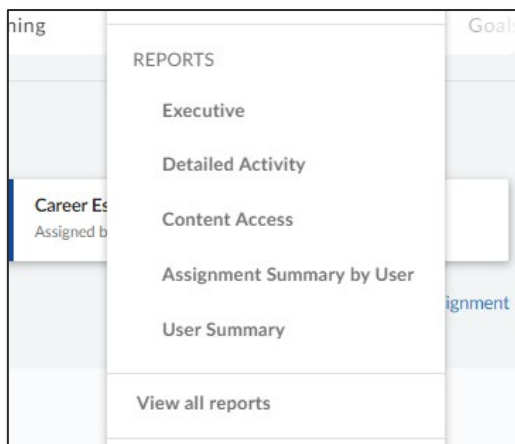
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Available Dashboards



1. **Overview Dashboard** shows overall employee platform engagement.
2. **Activity Dashboard** shows how employees access content and learner activity trends such as audiobook hours or courses viewed.
3. **Assignment Dashboard** displays assignment percent completed, overdue, and business alignment.
4. **Skill Benchmarks** displays metrics for employee skill benchmarks including completions and skill gains.
5. **Skills Discovery** gives insight into terms searched and skills chosen by employees.
6. **Executive Dashboard** highlights metrics including adoption, discovery, learning, and achievement.

Available Reports



1. **Executive** generates a CSV of activity such as count of active users, time in content, and unique titles accessed.
2. **Detailed Activity** generates a CSV of user details including scores and completion status.
3. **Content Access** generates a CSV of all content accessed, total users who accessed it, and badges earned.
4. **Assignment Summary by User** generates a CSV with a summary of all content assigned to a specific user.
5. **User Summary** generates a CSV of general user details including a count of views, hours, and completions.

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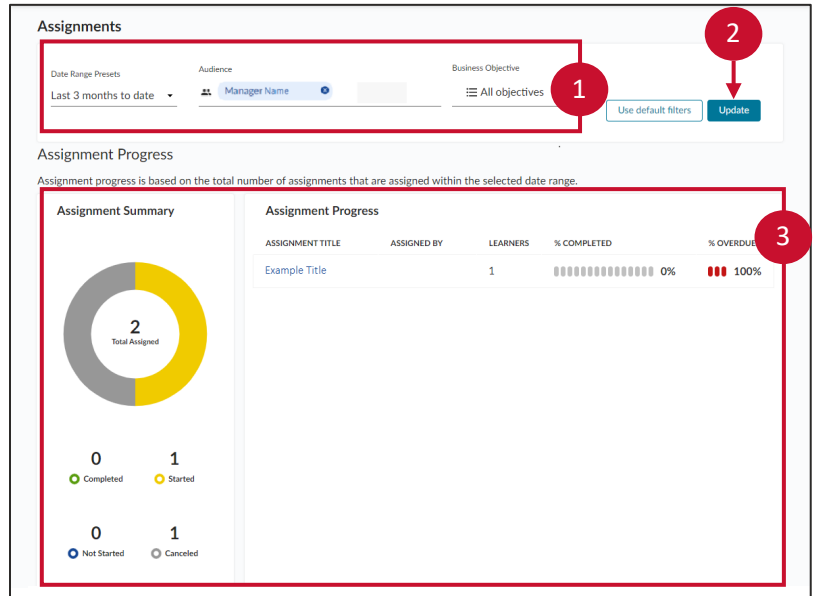
Frequently Used Dashboards

Assignments Dashboard

From the **Assignments Dashboard**:

1. Filter content by **date range, audience, and objective**.
2. Select **Update**.
3. An assignment progress summary displays.

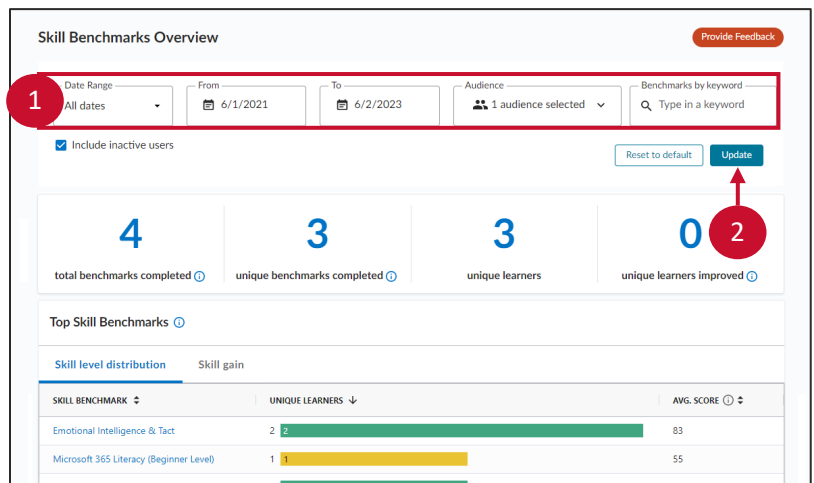
Note: Scroll down to view a **Business Alignment** summary.



Skill Benchmarks Dashboard

From the **Skill Benchmarks Overview Dashboard**:

1. Filter content by **date range, audience, and keyword**.
2. Select **Update** to view the data.



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Frequently Used Reports

Detailed Activity Report

On the **Detailed Activity Report** page:

1. Filter content by **Date range**, **Audience** (ex: manager name), **User**, **Collection** or **content group**, **Asset type** (course, etc.), **Content title**, and/or **Language**

Use default filters to display all info for users.

2. Select the **Update** button.
3. Select **Download report** to download the data.

USER ID	FIRST N...	LAST N...	CONTENT TITLE	CONTENT...	CONTENT OWNER	STATUS	COMPLETED DATE
12345678	Ella	Vader	Add Your Custom ...	Course	Skillsoft	Completed	2023-0...
87654321	Arti	San	Pericpio Onboardi...	Course	Skillsoft	Started	
12345678	Ella	Vader	Introduction to th...	Course	University of Maryland, ...	Completed	2023-06-16
87654321	Arti	San	Accessing Training...	Link	University of Maryland, ...	Completed	2023-06-22
12345678	Ella	Vader	eLearning FAQ	Link	University of Maryland, ...	Completed	2023-06-28

Assignment Summary by User Report

On the **Assignment Summary by User Report** page:

1. Filter content by **date range**, **assignment title**, **assignment status**, **audience**, and/or **user**.
2. Select the **Update table** button.
3. Select **Download report** to download the data.

ASSIGNMENT TITLE	STATUS	USER ID	FIRST...	LAST...	EMAIL	DUE DATE	COMPLETED DATE	ASSIGNED DATE	USER STATUS	% CON
Core Values	Started	12345678				3/31/2023		3/20/2023	active	0%
Core Values	Completed	12345678				2/25/2024	5/29/2023	5/1/2023	active	100%

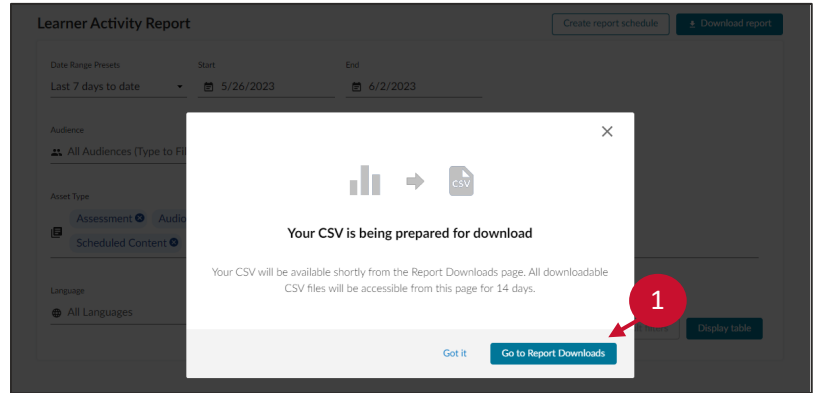
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View Downloaded Reports

After downloading a report, in the CSV pop-up window:

1. Select **Go to Report Downloads**.

Note: The **Report Downloads** page is also accessible directly through the **Analytics** drop-down menu.

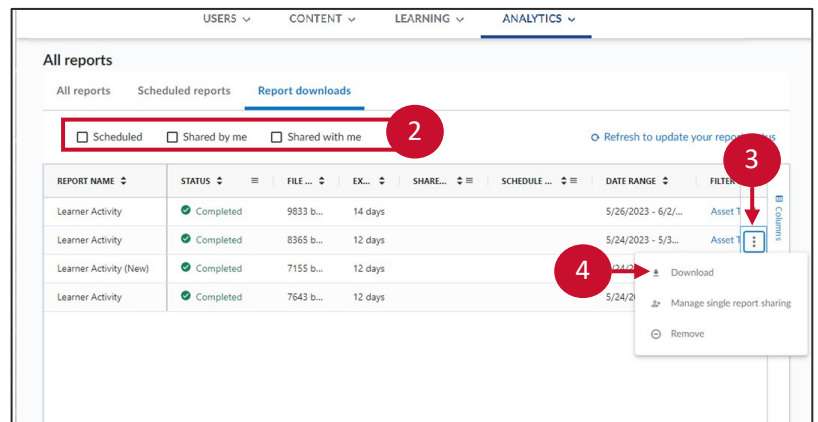


The **Report Downloads** page displays all generated reports within the last 14 days.

2. Filter the displayed reports using the checkboxes for **Scheduled**, **Shared by me**, and **Shared with me**.

To download a specific report:

3. Select the **three vertical dots** menu.
4. Select **Download** to display data in a CSV file.

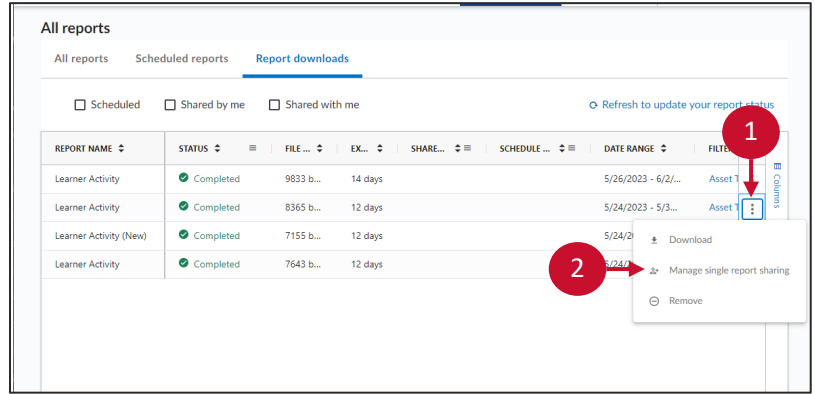


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Share a Report

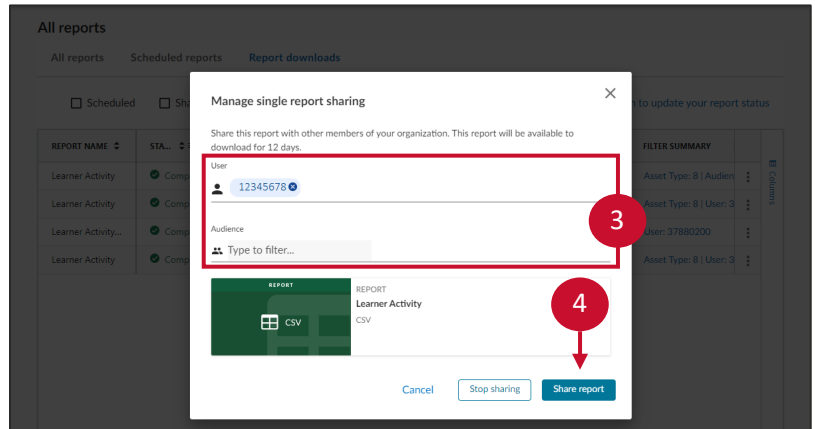
On the **Report Downloads** page:

1. Select the **three vertical dots** menu next to the desired report.
2. Select **Manage single report sharing**.



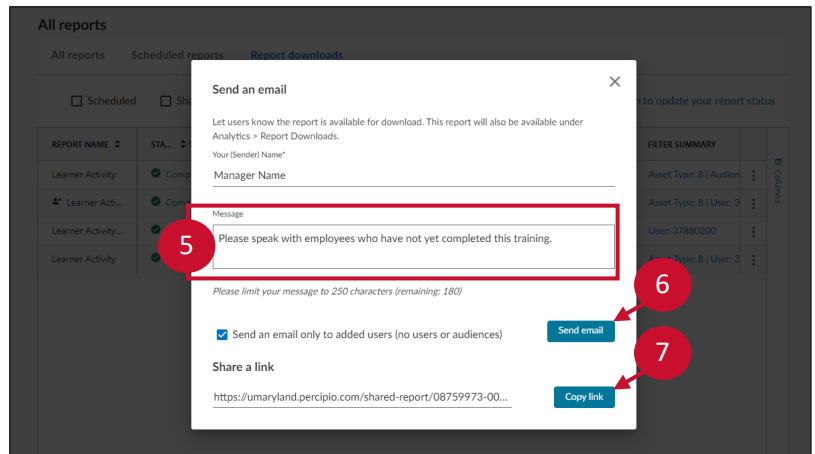
3. In the pop-up window, enter the user(s) information.
4. Select **Share report**.

Note: if you would like to stop sharing a report that you have previously shared, select **Stop sharing**.



To share the report as an email:

5. Enter a custom message.
6. Select **Send email** to send the message directly from Percipio.



To share the report separately:

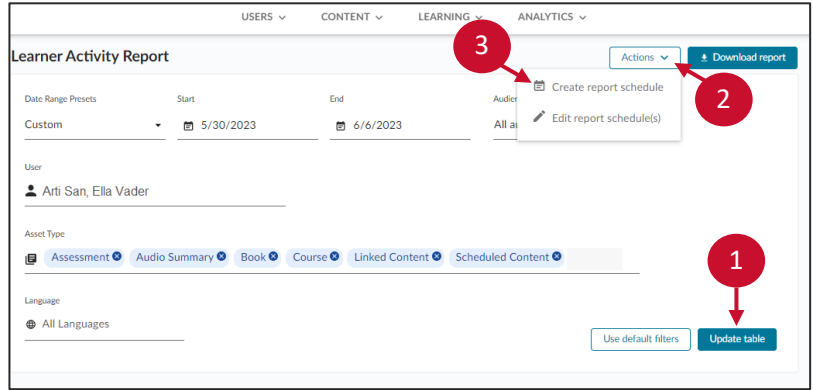
7. Select **Copy link**.

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Schedule a Report

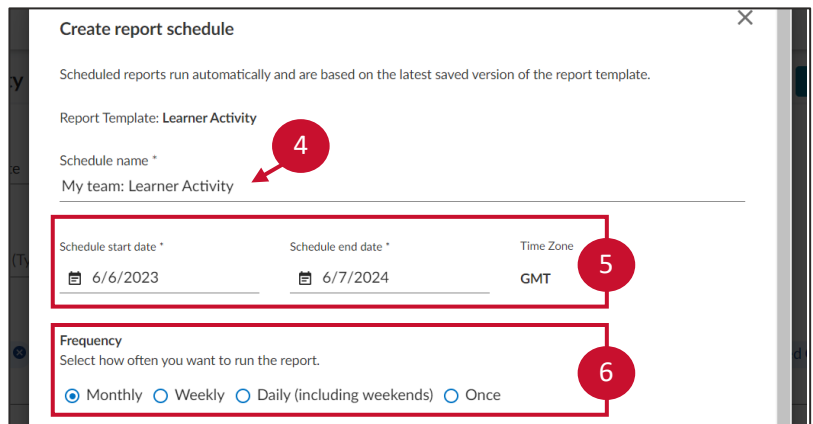
On the chosen report page:

1. Set the desired report parameters. Then, select the **Update Table** button.
2. Select the **Actions** drop-down menu.
3. Select **Create Report Schedule**.

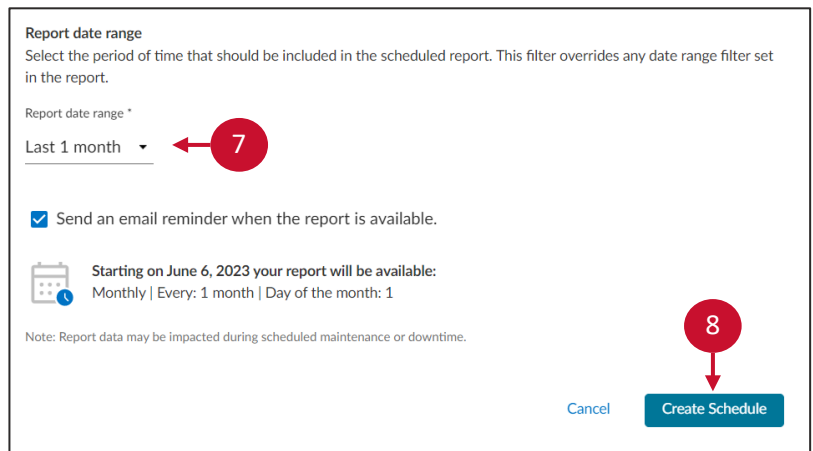


In the pop-up window:

4. Title the report.
5. Choose the dates during which you would like the report to run.
6. Determine the reporting frequency.



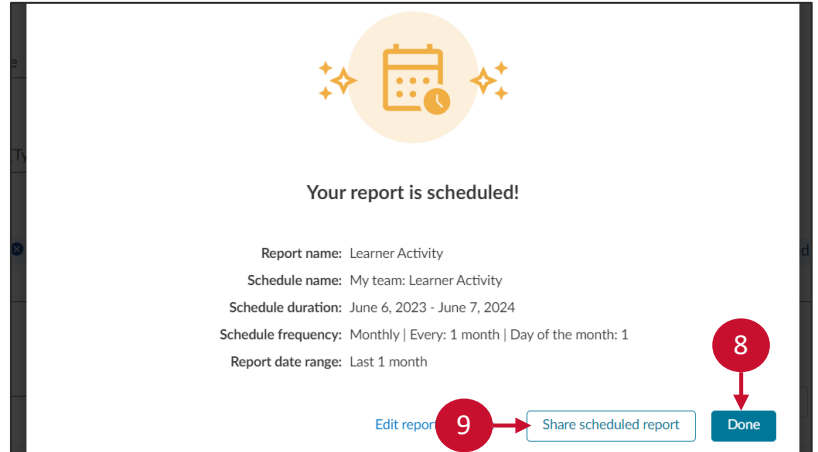
7. Determine the range of dates you would like to include in the report.
8. Select **Create Report**.



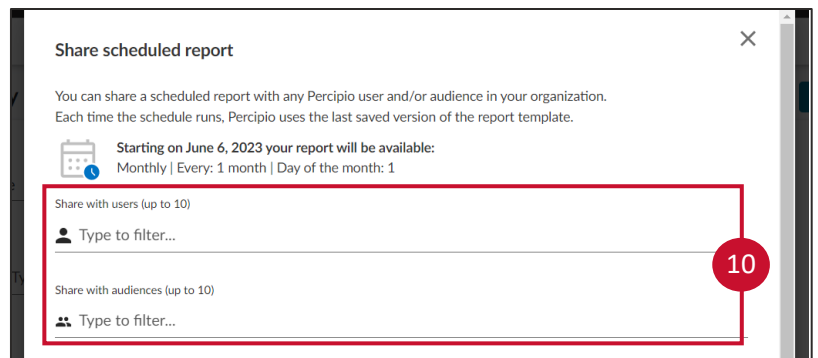
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Schedule a Report (Continued)

8. If you are the only viewer for the report, select **Done**.
9. To share the report, select **Share Scheduled Report**.

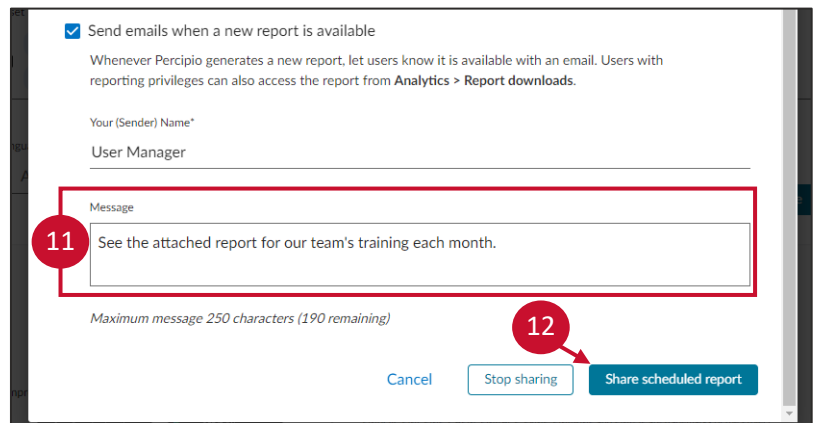


10. Add the users and/or audiences with whom you would like to share the report.



11. Customize the email message as desired.
12. Select **Share Scheduled Report**.

Note: if you would like to stop sharing a report, select **Stop sharing**.



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Compliance Reporting

1. Compliance-specific reports are automatically delivered to department heads via email every 30 days.
 2. Supplemental reports can be requested using the [request form](#).
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