

Job Aid - External Contractor Administrator Accessing Reports

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Introduction

This Job Aid will walk you through how to process Certification Summary reports that display summary information for certifications and Certificate Details reports that display users' detailed certification statuses.

Certification Summary Report

This report enables administrators to report users' certification statuses within the new Certification module. Multiple certifications can be included in this report.

This is an asynchronous report, which allows the Administrator to define the standard report and generate the report asynchronously. As a result, when Administrators process the report, the system generates the report in the background, while the Administrator can move on to other areas of the system.

When the report is finished processing, the Administrator can then view the full report in its entirety.

- Up to three (3), separate reports can generate asynchronously, allowing greater flexibility for creating and storing different versions of the report.
- If you process a report or refresh a stored report, the report appears in the table as Queued.
- The most recently created report displays at the top of the table.
- Since a user can generate up to three (3) reports, the Administrator can define a report title for each generated report.
- Clicking the View Details icon changes the report settings on the page to match those of the selected previously run report.
- 1. Hover over the Reports tab from the Welcome page and select the Standard Reports option from the dropdown list.



2. On the Reports page, click on the Certification Summary Report link.



- 3. Date Criteria section: Specify the date criteria, from, and dates.
- 4. User Criteria: Specify more detailed criteria for your report.
 - User Criteria: Click on the dropdown list to select your criteria.
 - i. Select your Division or your Company name under the Contractor Division.
 - Specify further details for your selection by clicking on the Expand icon. Search and locate your Division/company by entering information in the filter boxes, clicking on the Search button, or using the expanded icons to search.
 - Click on the Add button beside the result title to apply it.

Please note: Multiple criteria selections can be added to one report.

Certification Summary Report	Sear	ch			
Report Criteria	Nam		ID:	Owner:	
Displays Summary information for Certifications.	Q	Search			
	> Vie	w Hierarchy			
DATE CRITERIA	Selec	ted Division			
	REMO	VE TITLE			ID
Date Criteria : Select From: 1/1/2021	o: 🗊	Metrolinx			Contractor_292
	1	3 Bell Painters Ltd			Contractor_002
	1	A & B Rail Services			Contractor_005
USER CRITERIA	<u></u>	Accenture			Contractor_009
The availability criteria that you select will only include				(509 Results) 1 2	2 3 4 5 > >>
Division	Sear	ch Results			
	ADD	TITLE	ID	OWNER	PARENT
	0	2232420 Ontario Ltd	Contracto	r_001	Contractors
		232420 Ontario td_Group_Inbox	Contracto	r_001_Group_Inbox	2232420 Ontario Ltd
Certification: Select Certifications	N/A	2 Roll Baintors Ltd	Contractor	. 002	5005249 Optario

• Click on the Done button to apply your selections.



• Unselect the checkboxes if you do not want to include subordinate criteria from the master criteria selected.



- 5. Advanced Criteria: Specify what criteria information you want to be pulled into the report.
 - Certification: Click on the Select Certifications expand icon, search, and select the training by clicking the add button beside the training.

 The availability criteria that you se

 Division

 I all users in Division: Metri

 All users in Division: A & t

 All users in Division: A ccet

 Example

 Certification:

 Select Certification

 Certification:

 Select Certification

 Certification Status:

 Certification Status:

 Certification Status:

 Certification Status:

 Certification Status:

Please note: Multiple trainings can be added to one report.

• Click on the Done button to apply for the certifications.

Select Training		
REMOVE	TITLE	TYPE
Ì	Personal Track Safety	Certification
	Cance	

 Continue to specify criteria by clicking on the checkboxes and radio buttons: Certification status, include inactive users, includes archived users, and view by.

ADVANCED CRITERIA	
Certification:	Select Certifications 2
	Title
	Personal Track Safety
Certification Status:	Pending Prerequisite Pending Approval In Progress Denied Pending Completion Approval Expired Expired (Pending Renewal Completion Approval) Certified (Renewal In Progress) Certified (Pending Renewal Completion Approval) Revoked Past Due Past Due Past Due Certified (Pending Renewal Completion Approval) Revoked Certified (Pending Renewal Completion Approval) Certified (Renewal In Progress) Certified (Pending Renewal Completion Approval) Revoked Certified (Pending Renewal Completion Approval) Certified (Pending Renewal Completion Approval)
Include Inactive Users:	8
Include Archived Users:	
View By:	None Employee Certification

6. Process Report: Enter the title for the repot and click on the Process Report link. If not report title is entered, the title of the report will default to Certification Summary Report.

PROCESS REPORT	
Report Title:	Contractors PTS Completion Report (If no report title is entered, the title of the report will default to Certification Summary Report)

View Reports

All processing and processed reports are displayed at the bottom of the page under the Processed Reports section. This is where you can view the report's processing status, access the report, view the report details, and delete the report.

Click on the corresponding icon to perform the function.

Processed Reports					
Report Name	Create Date	Last Run	Output	Options	
Contractors PTS Completion Report	01/22/2021	Never		Queued	İ
Certification Summary Report	01/13/2021	01/13/2021	×	2 🔊	İ
Certification Summary Report	01/13/2021	01/13/2021	×	2 🔊	Ì

Export the report in the indicated output format.

- Refresh report.
- Wiew details of the report.
- Queued Report is in the queue.
- 🔲 Delete report.

Report Output Examples

Output not grouped

Name	User ID	Division	Location	Cost Center	Certification Title	Version	Current Status	Valid Until	Certification Period Title	Credits required for Completion	
					How to be a good sales						
Jamie Anderson	janderson	sales	santa monica	sales	person		1 Certified	10/20/2011	Renewal Period 2		0
					How to be a good sales						
Jamie Anderson	janderson	sales	santa monica	sales	person 2		1 In Progress	N/A	Initial Period	1	1
					How to be a good sales						
Joe Le	jle	sales	santa monica	sales	person		2 Expired	10/20/2009	Renewal Period 1	1	10
Lisa Poon	Lpoon	Care	New York	care	Customer Service		1 Expired	1/1/2009	Initial Period	1	13
		Product		Product			Certified (Renewal In				
Tina Smith	tsmith	Management	New York	Management	Product Design 123		2 Progress)	11/22/2011	Renewal Period 2	1	5
i											

Output grouped by Employee

Certification Title: H	ow to be a good sales	person								
Name	User ID	Division	Location	Cost Center	Version	Current Status	Valid Until	Certification Period Title	Credits required for Completion	
Jamie Anderson	janderson	sales	santa monica	sales		1 Certified	10/20/2011	Renewal Period 2		0
Joe Le	jle	sales	santa monica	sales		2 Expired	10/20/2009	Renewal Period 1		10
Certification Title: H	ow to be a good sales	person 2	location	Cost Center	Varsion	Current	Valid Intil	Certification	Credits required for	
Jamie Anderson	janderson	sales	santa monica	sales	VEISION	1 In Progress	N/A	Initial Period	Completion	11
										÷

Output grouped by Certification

User: Jamie Anderson, l	Jser ID: janderson		Division: Sales	Location: Santa Monica	Cost Center: Sales Certification	Credits required for
Certification Title	Version		Current Status	Valid Until	Period Title	Completion
How to be a good sales person		1	Certified	10/20/2011	Renewal Period 2	
How to be a good sales person 2		1	In Progress	N/A	Initial Period	
User: Joe Le, User ID: Jle Certification Title	Version		Division: Sales Current Status	Location: Santa Monica Valid Until	Cost Center: Sales Certification Period Title	Credits required for Completion
How to be a good sales person		2	Expired	10/20/2009	Renewal Period 1	
		_				-

Certification Details Report

This report displays users' progress for each learning object within a certification.

1. Hover over the Reports tab from the Welcome page and select the Standard Reports option from the dropdown list.

Home	Learning	Reports	Content	Admin	Competence				
	Welcome,	Standard R	eports						
		Dashboard	5						
		Reporting 2	2.0						

2. On the Reports page, click on the Certifications Details link.

Reports	
Click on a report category to view those reports. Y	ou may search for any reports by title or description.
Training	
Certification Summary Report Displays Summary Information for Certifications.	Certifications Details

- 3. User Criteria: Specify more detailed criteria for your report.
 - i. Select your Division or your Company name under the Contractor Division.
 - Specify further details for your selection by clicking on the Expand icon. Search and locate your Division/company by entering information in the filter boxes, clicking on the Search button, or using the expanded icons to search.
 - Click on the Add button beside the result title to apply it.

Please note: Multiple criteria selections can be added to one report.

Certifications Details	Sea	arch			
Report Criteria	Nar	Search	ID:	Owner:	
Displays Summary information for Certifications.	• v	iew Hierarchy			
DATE CRITERIA	Sel	ected Division			
Date Criteria : Select From: 1/1/2021	REF	Metrolinx			Contractor_292
		3 Bell Painters Ltd A & B Rail Services	;		Contractor_002 Contractor_005
		Accenture		(FOO Booutto)	Contractor_009
User Criteria : The availability criteria that you select will only include Division	Sea	arch Results		(509 Results)	
<u> </u>	ADI	D TITLE	ID	OWNER	PARENT
	•	2232420 Ontario Ltd	Cont	ractor_001	Contractors
ADVANCED CRITERIA	- 📀	2 32420 Ontario Ud_Group_Inbox	Cont	ractor_001_Group_Inbox	2232420 Ontario Ltd
Certification: Select Certifications	N/4	3 Bell Painters I td	Cont	ractor 002	5005249 Ontario

• Click on the Done button to apply your selections.



• Unselect the checkboxes if you do not want to include subordinate criteria from the master criteria selected. 🕑 Include Subordinates



- 4. Advanced Criteria: Specify what criteria information you want to be pulled into the report.
 - Certification: Click on the Certification expand icon, search, and select the training by clicking on the add button beside the training.

Please note: Only one (1) training can be added to the report.

certifications Details		Search for training ×			
		Title	Description	English (US)	✓ Search
Report Criteria					
Displays users' detailed certification status.					(2 Results)
You must select at least one certification USER CRITERIA		ersonal Track Safety Rail Safe	fety Safety etion of the Personal Track Safety o	course	
User Criteria: S	ne availability criteria that you select wi select Criteria All users in Division: Metrolinx (SS_UAT PTS Compliance Ge Certificate for UAT PTS Course 	neral		
ADVANCED CRITERIA Certification: Certification Period: (e)	Current Period O All Periods				

- Certification Period: Specify the certification period by clicking on the radio button for either Current Period or All Periods. All periods include training from all past certification periods. Only training from the current certification period is displayed if this option is not selected.
- User Status: Click the checkbox if you want to include users whose Certification has been archived.
- Include Inactive Users: Click the checkbox if you want to include all inactive user's certifications in the report.
- View by: Define whether you would like to see the certification information in a detailed format or summary level.



5. Choose the output to how you would like to export the information by clicking on the link. You can print the report or export it to Excel.

OUTPUT

Report Output Examples

Printed Report-





Excel Output

Certification Detailed Re	port							
Personal Track Safety								
		Certification Status Number Of Users						
		In Progress	88					
		Certified	6					
Satgunam,Saraniya(Saraniya.Satgunam)-[Metrolinx] Division, [] Location								
Period Title	Three Year Renewal							
Due Date	N/A							
Period Expiration Date	1/13/2024	÷						
Completed Training	Туре	Section	Date Completed	Credits Acquired				
Incomplete Training	Туре	Section	Training Status					
Personal Track Safety	Event	PTS Course	Approved					
Period Required Credit		2						
Total Acquired Credit		0						
Certification Status	In Progres	S						