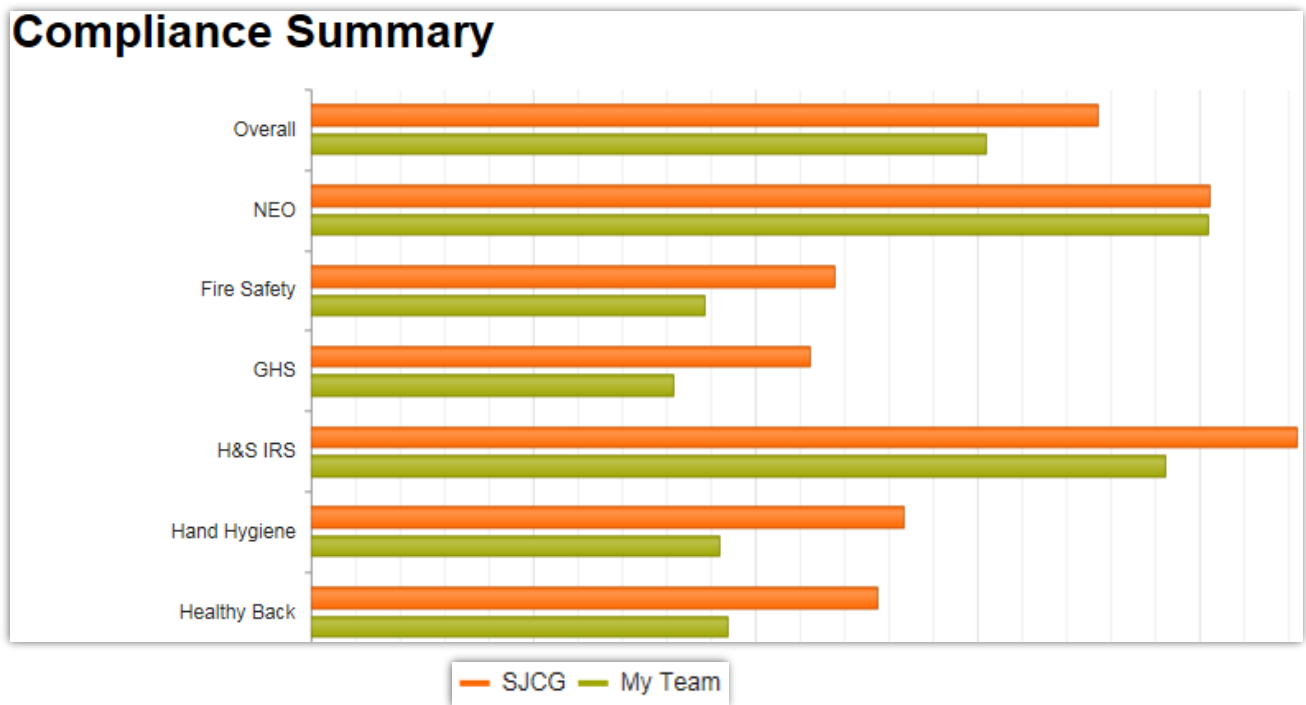


Manager Reporting FAQ

1. How can I see the compliance of the staff who report to me?

Click on the **My Team** menu option at the top of the page, and then click on **Compliance Summary**.



This report presents a visual summary of the organization's compliance level. The first row, "Overall", reports on overall compliance for all **mandatory** courses. Each subsequent row reports on an individual mandatory course.

When the report is viewed by a Director or Manager, the first bar (shown in **orange** in the screen above) shows the compliance level of the organization as a whole, while the second bar (shown in **green** in the screen above) represents the compliance of the staff members who **directly report to them**.

Hover over the green bar to show your team's completion rate.

Click on a **course's title** (e.g. "Fire Safety" in the screenshot above) to open the Compliance report for that specific course. Click on the **"Overall"** label (the first row in the report) to open the Compliance report for all courses listed in your summary.

Below is the compliance report for a sample department for the Fire Safety & Emergency Codes course.

Compliance report

This report tabulates users' compliance with course completion requirements. Only users registered in a program in which this course belongs are reported on.

First name	Surname	Class Desc...	Departmen...	Position D...	Completo...	Due date	Enrolment...	Course sta...
Sarah	Kuzik	PB 6	In Service Education	Corporate Learning Facilitator	2019-01-16	2020-12-31	2018-10-05	Compliant
Remo	D'Angelo	PB 6	In Service Education	Corporate Learning Facilitator	2019-01-02	2020-12-31	2018-10-05	Compliant
Tammy	McKinnon	MG PB 11 Social Worker	In Service Education	Manager Corporate Learning	2018-12-07	2019-12-31	2018-10-05	Not compliant
Jane	Doe	PB 6	In Service Education	Corporate Learning Facilitator	-	2018-12-31	2018-10-05	Not compliant

20 items per page 1 - 4 of 4 items

Click on any of the 3 dots to customize the columns that are included in the report. If changes are made click on the Save Configuration button

Click in any box to type in a filter (ie name, department or status) and select the filter type for that column.

Click **Export to Excel** to export the report, save, or print it. This allows you to use Excel's features to further filter or sort the report to suit your needs.

If you want to print the report, the best option is to print from Excel. You will need to do some formatting to ensure the report prints with all columns on a page. The following may help:

- Remove any unnecessary columns
- Change the page orientation to landscape
- If needed, change the paper size to Legal (8 ½ x 14")

2. How can I see the compliance of a single staff who reports to me?

Click on the **My Team** menu option at the top of the page, and then click on **Learning Records**.

- Select the appropriate dates in the **Start Time** and **End Time** parameters for the period of time you'd like to search.
- Type in the full staff name in the **User full name** field (this must match Virtuo).
- Select ALL for **Action**.
- Select Courses for **Record type**.
- Click the **Filter** button to display the results.

This will display the records for all courses the staff member completed within your date parameters. If you want to ensure you see a full history from date of hire, you can set the start year to 2004. Electronic records started in 2005.

Learning Records

▼ Filter

Start time 10 June 2005 00 00 Enable

End time 10 June 2019 23 59 Enable

Search by Date completed

User full name contains TYPE FULL STAFF NAME HERE

Course name contains

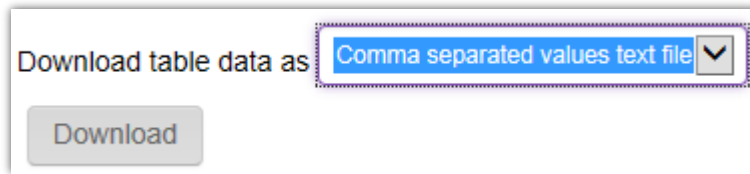
Action All
Completed
Attended

Record Type All
Courses
Programs

Show voided records

Filter **Cancel**

At the bottom of the report is the Download button.



Download table data as Comma separated values text file ▼

Download

Select Download table data as a “Comma separated values text file” and save it as an Excel document. You can then open the report in Excel and apply any sorting or filtering needed.

3. How can I see which staff members who report to me have completed a course that is not a mandatory course?

The Learning Records report can also be used to show which staff members have completed a particular course.

Click on the **My Team** menu option at the top of the page, and then click on **Learning Records**.

- Select the appropriate dates in the **Start Time** and **End Time** parameters for the period of time you'd like to search.
- Type in the course name (or a part of it) in the **Course name** field.
- Select ALL for **Action**.
- Select Courses for **Record type**.
- Click the **Filter** button to display the results.

This will display the records for all staff members who completed a course with the name you entered, within your date parameters. If you want to ensure you see a full history from date of hire, you can set the start year to 2004. Electronic records started in 2005.