

# Manager's Guide

## *Assigning Learning & Running Reports in Skillport*

### **Main Purpose:**

Provide information to managers/supervisors on how to assign and report learning of their reports within the Skillport tool, for continuous professional development.

- I. Welcome & Overview (p. 1)
- II. Assigning Learning (p. 2-4)
- III. Reporting (p. 5-10)

### **I . Welcome & Overview**

Welcome to the Manager's Guide for Assigning Learning & Running Reports in Skillport. Online learning is an easy way for individuals to build their skills in a way, and at a time that is most convenient for them. All the data and research confirms that combining in person learning with online opportunities is the key to continuous and sustainable learning.

This tool provides you with the information you will need to both assign and report on learning of your reports.

#### **Why should you use this tool?**

- **Allows you to direct learning for an individual or team**
- **Connect professional development goals directly with learning opportunities beyond the in person sessions offered on campus**
- **Allows you to create customized modules of targeted learning specifically for your team**

Before you begin assigning or reporting on learning, please view the video below for a comprehensive overview of the system's functions.

#### *You will learn:*

- Layout of the administrative capabilities of Skillport.
- Functionality of different tasks.

#### *Please note:*

- Assigning learning and reporting on that learning are the primary reasons for your access as Notre Dame managers and supervisors. This includes assigning/reporting on learning with an individual or creating a learning group if you have more than one report participating in the learning.

ONLY use the functions that allow you to create learning programs for individuals or groups that report to you.

- Do NOT use the functions that would change the content or layout of the Skillport tool or deactivate users (i.e. anything contained within the "Display" function; or deleting a user or changing information within their particular account).

#### *Suggested Video BEFORE you get started:*

#### **OVERVIEW OF SKILLPORT'S ADMINISTRATIVE FUNCTIONS:**

[https://documentation.skillsoft.com/en\\_us/skillport/8\\_0/vid/ah/SP8\\_AdminUIOverview.mp4](https://documentation.skillsoft.com/en_us/skillport/8_0/vid/ah/SP8_AdminUIOverview.mp4)

## II. ASSIGNING LEARNING

Videos to assist you with ASSIGNING LEARNING:

### Assigning Content

[https://documentation.skillsoft.com/en\\_us/skillport/8\\_0/vid/ah/SP8\\_Assign\\_Content.mp4](https://documentation.skillsoft.com/en_us/skillport/8_0/vid/ah/SP8_Assign_Content.mp4)

### Understanding Learning Programs:

[https://documentation.skillsoft.com/en\\_us/skillport/8\\_0/vid/ah/SP8\\_Understanding\\_Learning\\_Programs.mp4](https://documentation.skillsoft.com/en_us/skillport/8_0/vid/ah/SP8_Understanding_Learning_Programs.mp4)

### Creating Learning Programs:

[https://documentation.skillsoft.com/en\\_us/skillport/8\\_0/vid/ah/SP8\\_Create\\_Learning\\_Program.mp4](https://documentation.skillsoft.com/en_us/skillport/8_0/vid/ah/SP8_Create_Learning_Program.mp4)

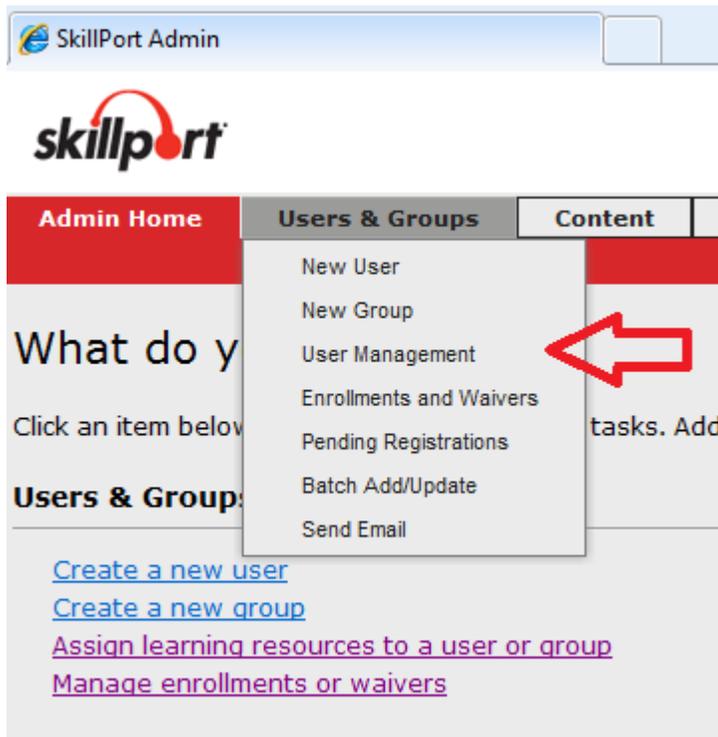
### Enrolling Users in a Learning Program:

[https://documentation.skillsoft.com/en\\_us/skillport/8\\_0/vid/ah/SP8\\_Enroll\\_LP.mp4](https://documentation.skillsoft.com/en_us/skillport/8_0/vid/ah/SP8_Enroll_LP.mp4)

Instructions:

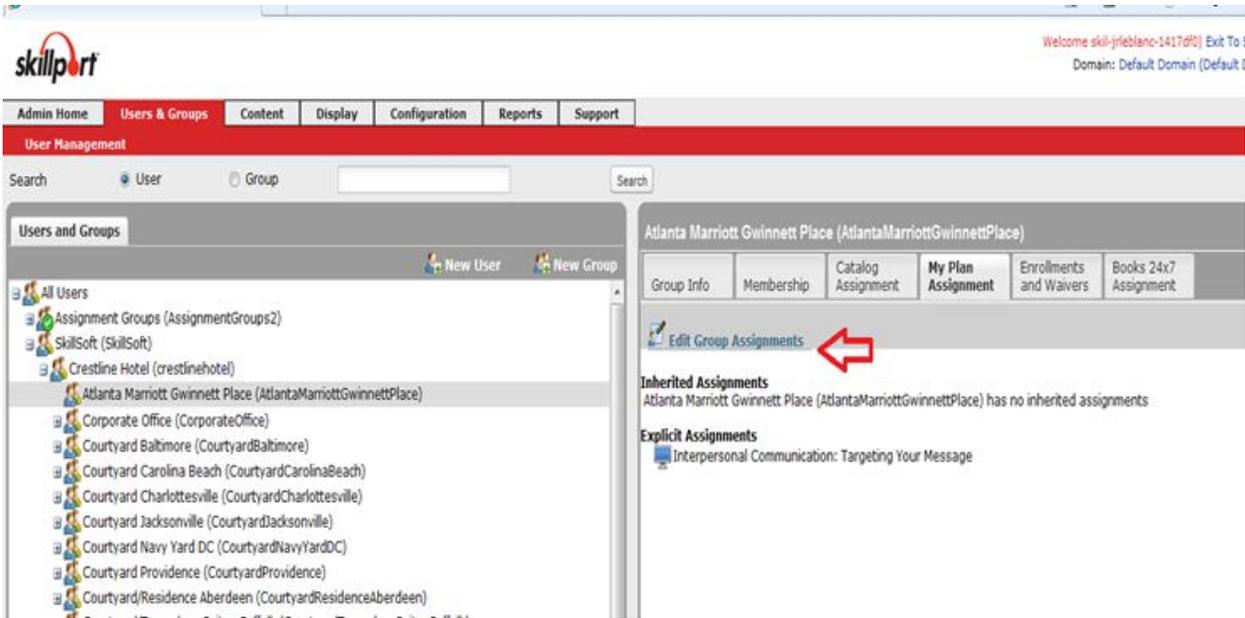
## Assigning Courses

1. Select Users and Groups in ADMIN interface
2. Select “Users and Groups” from options on Left side of screen
3. From drop down menu select “User Management”

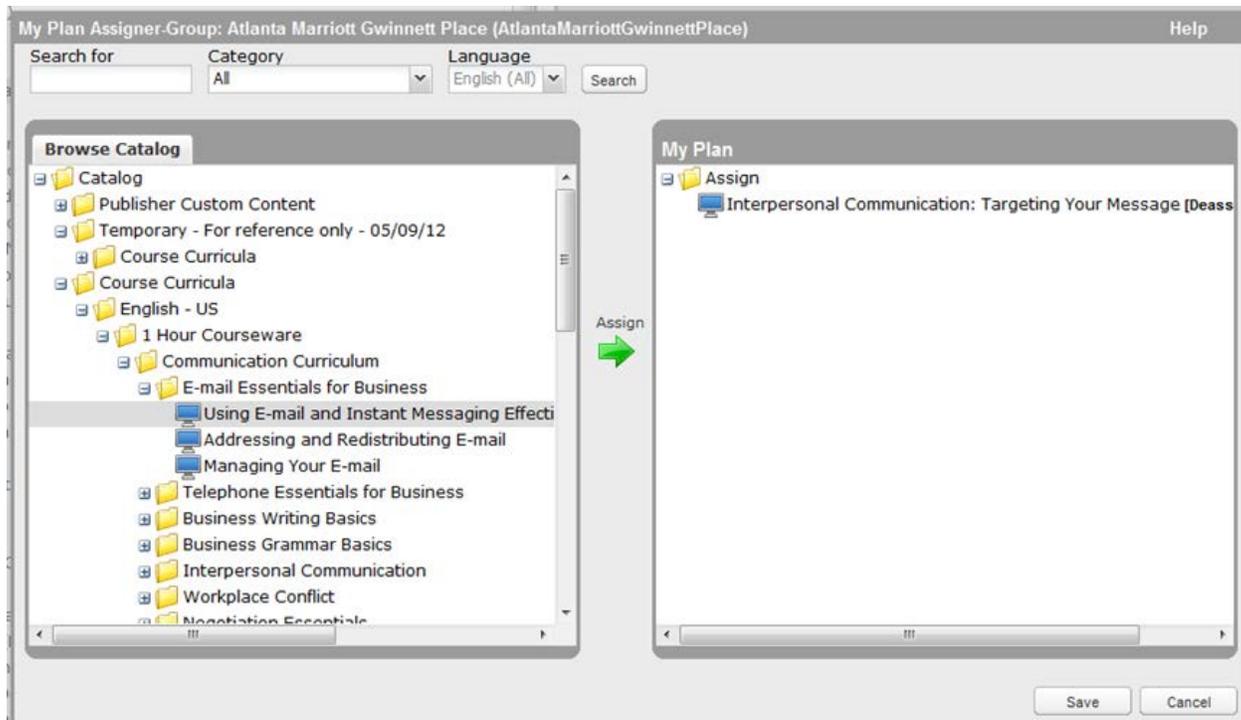


4. Choose the group or individual user from the organizational structure in which you need to assign a course

5. Select the “My Plan” tab on the right hand side of your screen and click “edit”



6. The next screen will bring you to the courses you can select



7. Once you clicked the save button a screen will open to allow you to identify dates and requirements for the curricula you have identified.

## Add to My Plan

**Add**  Using E-mail and Instant Messaging Effectively

**Goal**

**Due date**

None

Fixed date  

Period after assignment

Days

**Recurrence**  Reassign every  Days

**Reminder**

Allow users to set their own reminders

starting  Days  before the due date

**Overdue notices**

Allow users to choose their own overdue notices

Send weekly overdue notices

**Required**

OK

Cancel

### III. REPORTING

Video to assist you with REPORTING ON LEARNING:

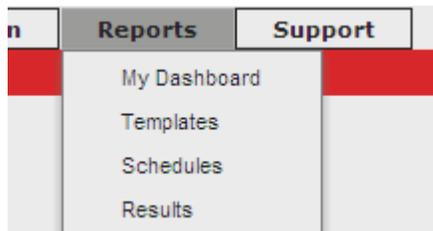
#### Learning Program Reports:

[https://documentation.skillsoft.com/en\\_us/skillport/8\\_0/vid/ah/SP8\\_LP\\_Reports.mp4](https://documentation.skillsoft.com/en_us/skillport/8_0/vid/ah/SP8_LP_Reports.mp4)

INSTRUCTIONS:

## Running Reports

The Reports menu includes a link for each section of the reporting feature.

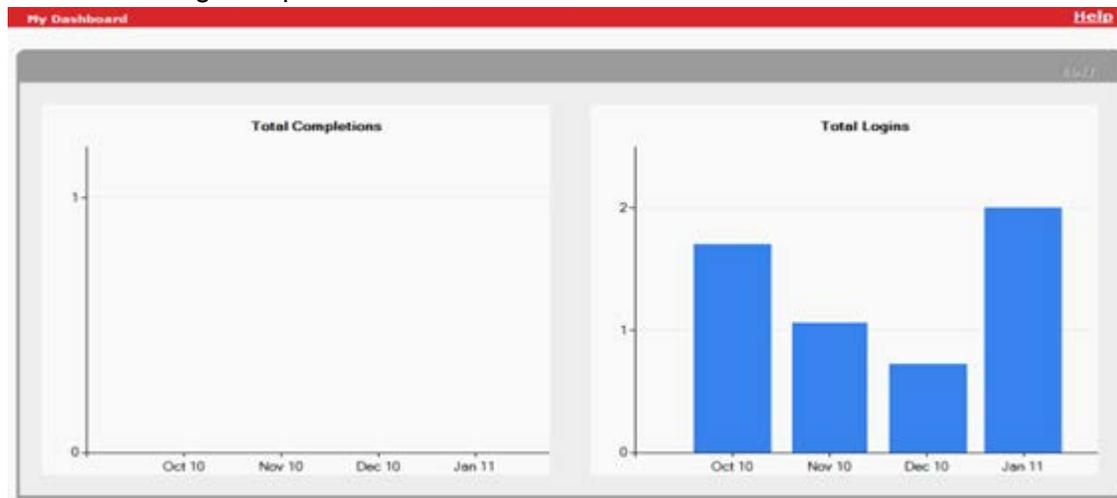


The following windows display for each menu option pictured above.

#### ► My Dashboard

The [My Dashboard](#) window contains two predefined reports displayed in chart form.

The *Total Completions* chart displays the number of course and Learning Program completions that have occurred during the specified time frame



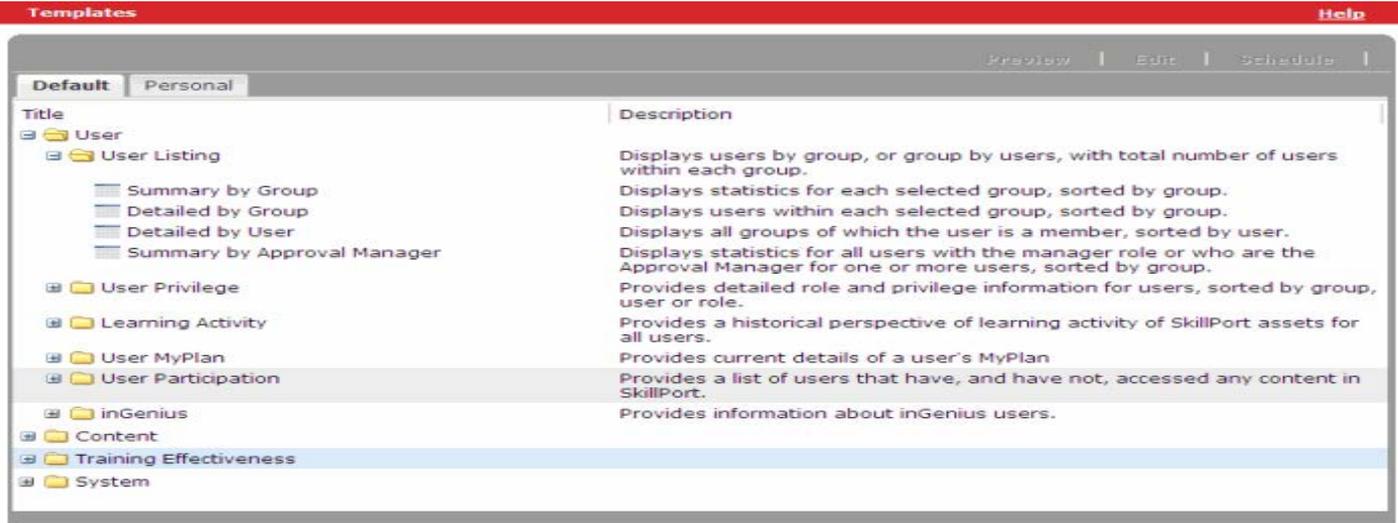
The *Total Logins* chart displays the number of users that have logged into the system during the specified time frame.

#### ► Templates

The [Templates](#) window contains a list of all report templates available in the Reporting feature. Templates are forms used to determine what dates, filter options, and display options should be included in report results.

*Default templates* are pre-defined templates that are standard with all SkillPort implementations.

Personal templates are customized templates you create by modifying default templates.



### ► Schedules

The [Schedules](#) window contains a list of all schedules associated with report templates. Schedules are used to automatically run reports in the future.

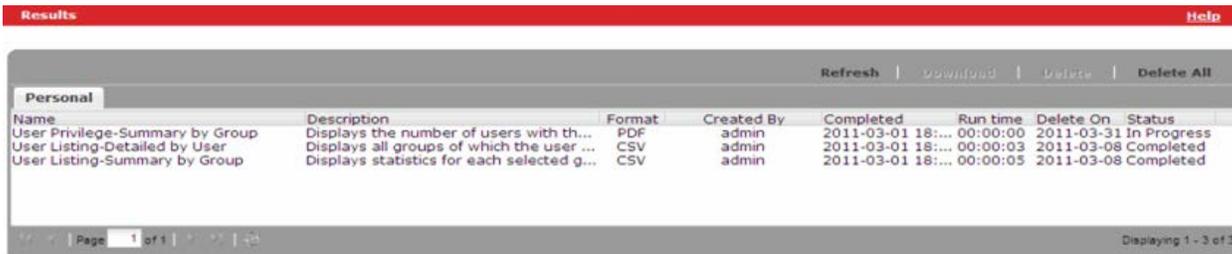
There are no default schedules included with Reporting. All schedules are created by the user. Schedules can be created for both Default and Personal Templates.



### ► Results

The [Results](#) window displays a list of all saved reports.

Reports are manually saved when you click the Save Results button, and automatically saved when a scheduled report is run.

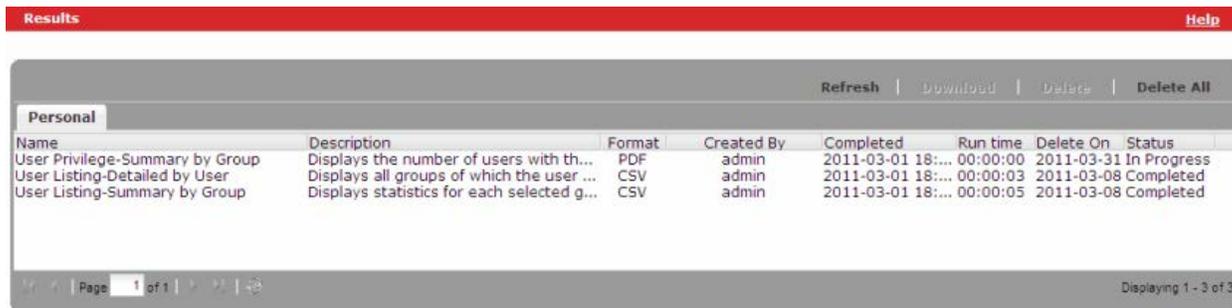


# Most Common Uses for Reports

You can:

- [Run a report](#). When you run a report, the results display in a preview screen. This view is temporary and you must save the results in order to maintain the data.
- [Save](#) the report results. Saving reports stores them on the Results window as shown below.
- [Schedule](#) a report to automatically run in the future. When a report is generated from a schedule, the results are automatically saved to the Results window.
- [Create a Personal template](#) to customize the report results.

## The Results Window



The screenshot shows a web interface titled "Results" with a "Help" link. Below the title bar are buttons for "Refresh", "Download", "Delete", and "Delete All". A "Personal" tab is selected. The main area contains a table with the following data:

Name	Description	Format	Created By	Completed	Run time	Delete On	Status
User Privilege-Summary by Group	Displays the number of users with th...	PDF	admin	2011-03-01 18:...	00:00:00	2011-03-31	In Progress
User Listing-Detailed by User	Displays all groups of which the user ...	CSV	admin	2011-03-01 18:...	00:00:03	2011-03-08	Completed
User Listing-Summary by Group	Displays statistics for each selected g...	CSV	admin	2011-03-01 18:...	00:00:05	2011-03-08	Completed

At the bottom, it shows "Page 1 of 1" and "Displaying 1 - 3 of 3".

**Note:** The results of each report reflect the current data held in SkillPort as of the last successful database refresh which occurs automatically. This includes group structure, user status, asset status, assignments, enrollments, approvals, and data from other platforms.

## Report

When you manually run a report you are actually previewing the results. This allows you to determine whether or not the report meets your needs before you save the results. **The preview is temporary and you must save the results in order to maintain the data.** You can also manually run a report from a schedule in the Schedules tab.

To run a report

1. Click Templates from the menu.
2. In the Templates window select either the Default or Personal tab.
3. Select the desired template.
4. Click Preview. The Report displays in the Preview window.

Templates >> Default >> KnowledgeCenter Access >> Activity by KnowledgeCenter

KnowledgeCenter ID	Username	First Name	Last Name	Group Org Code	Asset Title	First Access Date	Last Access Date	Times Accessed	Completion Date	Completion Status
Visual Basic KnowledgeCenter										
kc_vbso1_a02_kcc_enu	John Doe	John	Doe	group01	Advanced Language Features of Microsoft VB .NET	2010-10-15	2010-10-15	1		
kc_vbso1_a02_kcc_enu	John Doe	John	Doe	group01	Business Explorer Series	2010-10-15	2010-10-15	1		
kc_vbso1_a02_kcc_enu	John Doe	John	Doe	group01	Communicating a Shared Vision	2010-10-15	2010-10-15	1		
kc_vbso1_a02_kcc_enu	John Doe	John	Doe	group01	Developing a Business Execution Culture	2010-10-15	2010-10-15	1		
kc_vbso1_a02_kcc_enu	John Doe	John	Doe	group01	Indirect Co-op Program Dealer Tasks	2010-10-15	2010-10-15	1		
kc_vbso1_a02_kcc_enu	John Doe	John	Doe	group01	Leadership Essentials: Leading Innovation	2010-10-15	2010-10-15	1	2010-10-15	Completed
kc_vbso1_a02_kcc_enu	John Doe	John	Doe	group01	Overview of Managerial Accounting	2010-10-15	2010-10-15	1	2010-10-15	Completed

Page 1 of 1

In the Preview window you can:

- Sort the data by clicking the column headers.

Note: Changes to the sort order are not maintained when saving results.

- Edit the template to modify the dates, filters and display options in order to [create a personal template](#).
- Save Template if this template has been modified.
- [Save Result](#) of the report to the Results tab.

To manually run a scheduled report

1. From the menu click Schedules.
2. Select the desired schedule.
3. Click Run Now. The report will be saved to the [Results window](#) at the top of the list.

Notes:

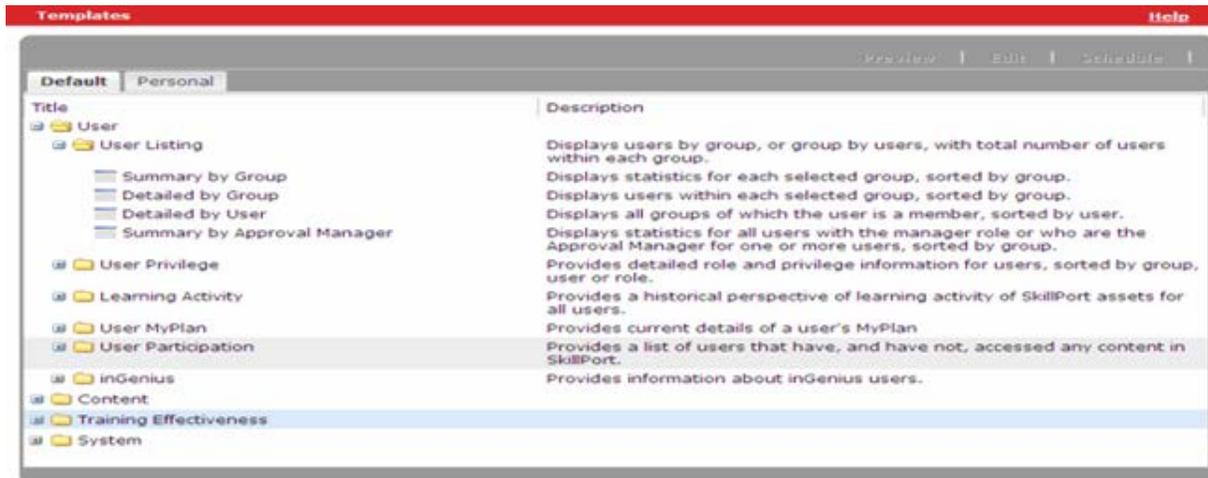
- Reports with a large amount of data may take several minutes to generate a preview.
- If the report contains no data, the column headers will still display, but with empty rows.
- Reports can also be previewed from a Template window.
- Reports run from schedules do not display in the Preview window.

## Understanding Templates

Templates are forms used to determine what dates, filter options, and display options should be included in report results. The SkillPort Reporting tool includes several Default Templates that contain predefined filter and display options and are designed to provide the user with 'out of the box' reporting functionality.

The Default templates can be edited in order to customize the data returned. You can save the customized templates to create Personal Templates.

All templates are stored on the Templates window.



The Templates window is divided into two tabs with system defined templates on the Default tab and user defined templates on the Personal tab. Templates are categorized by the type of data they report on, such as Content and System data. These categories are further divided into subgroups. For instance, the Content category includes template subgroups for reporting on specific asset types such as Learning Programs, ILT Courses, etc.

In the Templates window you can:

- Expand the category folders to see a brief description of each template.
- [Preview](#) the report results to verify whether or not the report meets your specific needs.
- Edit the template by customizing filters and display options in order to [create a personal template](#).
- [Schedule](#) a report to automatically run in the future.

## Understanding a Report Definition

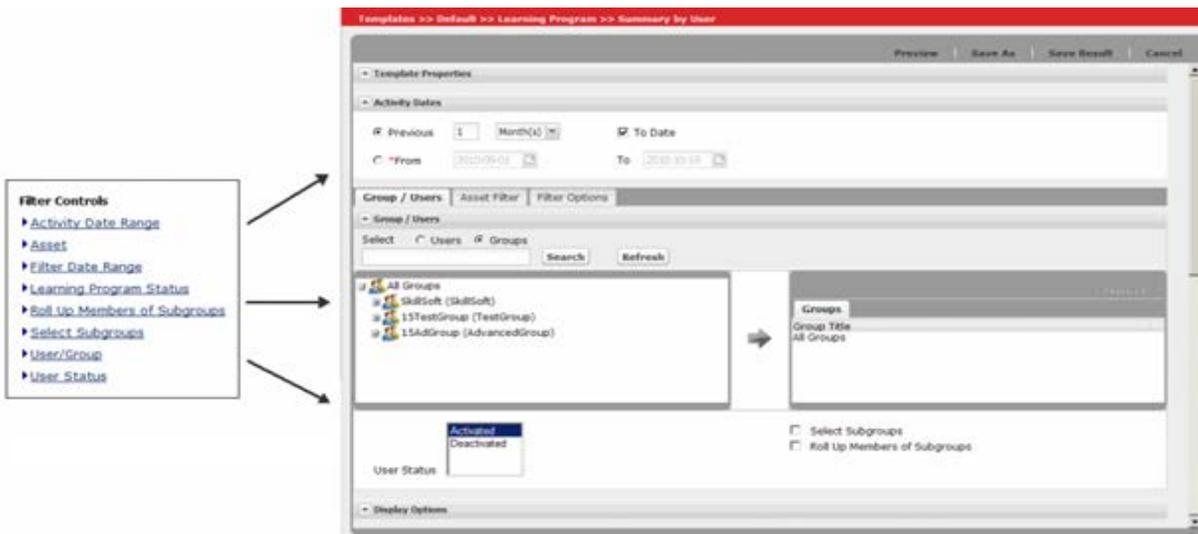
Each report definition in this section includes the following:

- § The **name** of the default template that you can use to run the report
- § A high-level **description** of the data contained in the report
- § A list of the **filter controls** in the template
- § A list of the **display options** in the template
- § Lists of the required, default, and optional **columns** of data in the report

### Filter Controls

In the Reporting interface, you use a template's filter controls to specify the data to include, for example, the organizational groups or types of assets on which to report.

Each report definition includes a list of the filter controls in the associated template, as shown in the following image.



In a report definition, click the name of any filter control to view its description and type. For more information on working with filter controls, see [Understanding Filters](#).

### Display Options

In the Reporting interface, you use a template's display options to specify the following:

- How the data appears in the report
- The columns to include in the report

Each report definition includes a list of the display options in the associated template and the columns that can be included in the report. There are 3 types of columns:

- **Required:** Because these are required, they are not shown in the user interface.
- **Default:** These can be unchecked to omit them.
- **Optional:** These can be checked to include them.



In a report definition, click any display option or column name to view its description. For more information on working with display options and columns, see [Select Display Options](#).