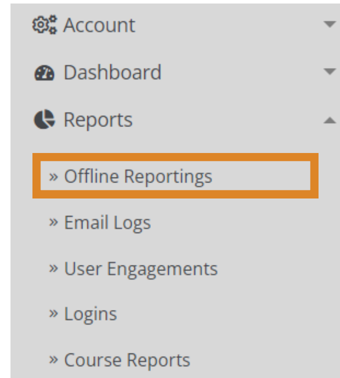
Records & Reporting

Click on an option to jump directly to that section

- Offline Reportings (Transcripts)
  - Complete and Incomplete Reports
  - Adding Offline Trainings
  - Importing Offline Trainings
  - Offline Reporting Settings
- Course Reports
- User Engagements
- Certificates
- Email Logs
- Logins
- User Mail
- Auto Convert Logs
- Course Expiring Enrollments

Records & Reporting

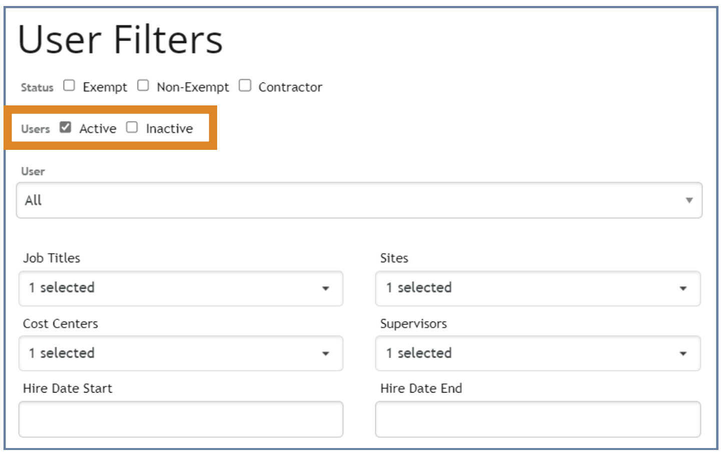
Offline Reportings (Transcripts)



Offline Reportings allows you to build customized reports of training records. Completion records for students are added to the reports immediately upon completion of the course. You may also add your own training records as "offline" trainings.

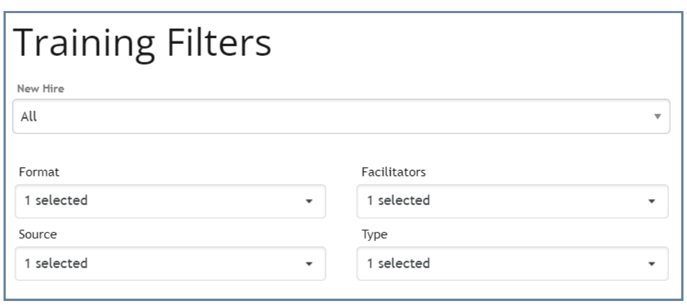
Home tab → **Reports** → **Offline Reportings**

There are a variety of options for User, Training, and Content Filters. Mix and match to build the specific report you need.



User Filters include **User**, **Job Title**, **Site**, **Cost Center**, **Supervisor**, **Hire Date**, and **Active/Inactive**. These are modifiers created in User Training Settings and applied in the student's profile. Filter data may differ from LMS to LMS depending on your organization's specific settings. See the *User Training Settings* section of the **User Management and Enrollment** guide for more information.

User Filters will default to show **Active** students only. Toggle **Inactive** on as well to include records for deactivated students or alumni.



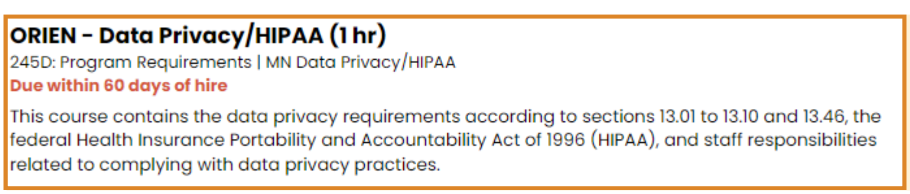
Training Filters include **Source**, **Format**, **Type**, and **New Hire** are for categorizing and sorting records and are applied to all STAR courses.

All STAR courses have training filters applied:

- **New Hire:** Due date as per statute
- **Source:** Statute/Rule the requirement comes from
- **Type:** As described or defined in statute

Training Filters can be customized and applied to custom content and offline trainings as well. See Offline Reporting Settings

These filters are also listed in the **STAR Fundamentals Course Directory** for your reference:


ORIEN - Data Privacy/HIPAA (1 hr)
245D: Program Requirements | MN Data Privacy/HIPAA
Due within 60 days of hire
This course contains the data privacy requirements according to sections 13.01 to 13.10 and 13.46, the federal Health Insurance Portability and Accountability Act of 1996 (HIPAA), and staff responsibilities related to complying with data privacy practices.

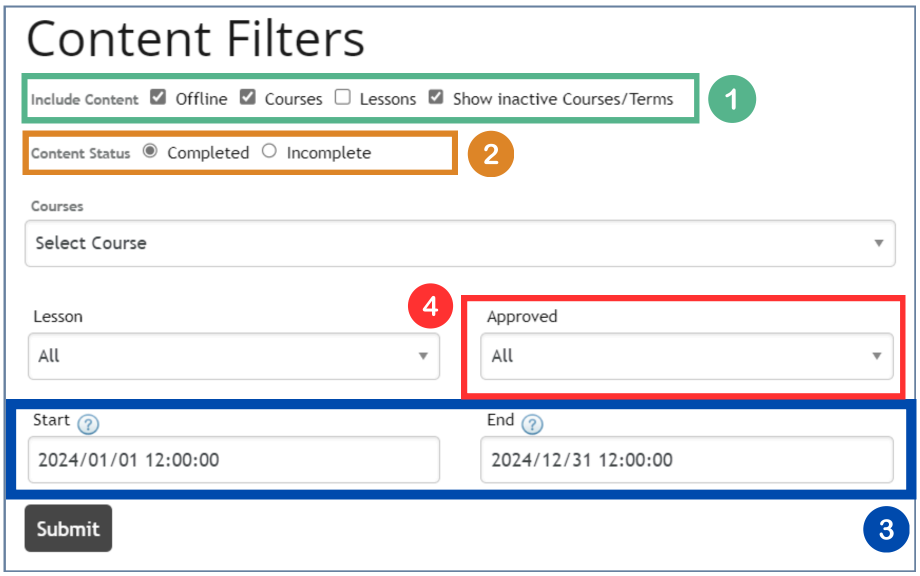
New Hire: 60 days
Source: 245D Program Requirements
Type: MN Data Privacy/HIPAA

Records & Reporting

Offline Reportings (Transcripts)

Home tab → **Reports** → **Offline Reportings**

Content Filters is where you set date ranges for the report and determine which content to include.



1 **Included Content** defaults:

- **Offline On** - any "Offline" trainings will be included in the report
- **Courses On** - any LMS courses will be included in the report
- **Lessons Off** - toggling Lessons on will include lesson completion dates as well as the course completion date resulting in a double count of the number of training hours. You will want one or the other but never both. Lesson reports do not include scores, just completion dates
- **Show Inactive Courses/Terms On** - any past courses and terms which have been deactivated will also be included in the training records

2 **Content Status** allows you to selected *Completed* or *Incomplete* trainings

3 **Start** and **End Dates** will always default to current year to date. This is convenient in the fall. Less convenient at the start of the year. If reports look off, check your date range!

4 **Training "Approval" -** It is possible for a student to self-report their "Offline" training which then needs to be approved by an administrator. This setting is off by default. If you would like more information about this setting, please contact the Help Desk

Use Case for Filters

There is an incident of maltreatment at your organization's Maple site. DHS requests a report of all Maltreatment training completed by Maple staff in the past year

User Filters:
Use the Site filter to select "Maple"

Training Filters:
Use the Type filter to select "Maltreatment of Adults and Children"

Content Filters:
Set the date range for the past calendar year

Filters allow you to pull the exact report you want quickly and easily

Records & Reporting

Offline Reportings (Transcripts)

Home tab → **Reports** → **Offline Reportings**

Running a Report for Completed Courses

1. Select the appropriate **User** and/or **Training** filters to determine which students/courses to display
2. Choose your desired **Date Range**
3. Click **Submit** and your report will generate on screen for customization and export

Running a Report for Incomplete Courses

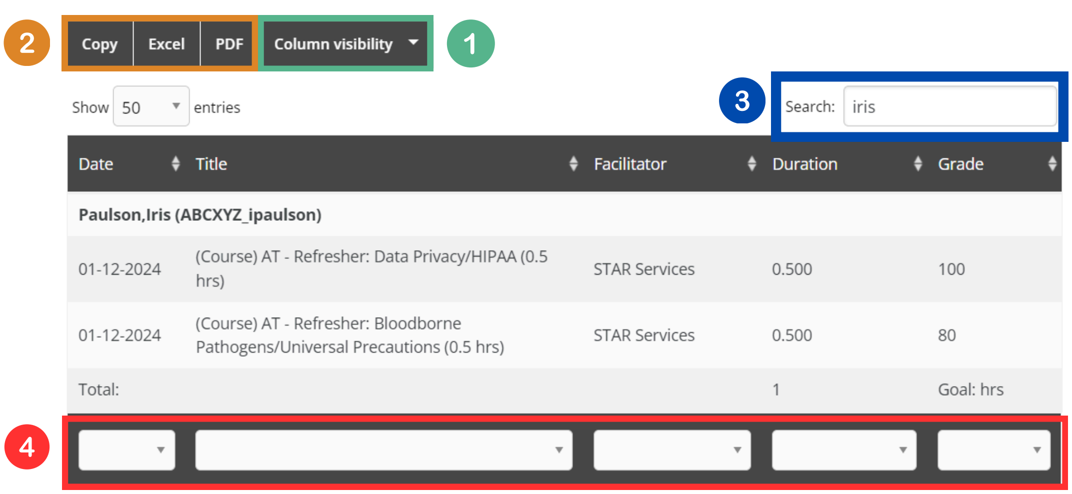
1. Select the appropriate **User** and/or **Training** filters to determine which students/courses to display
2. In the Content Filters, **uncheck** **"Show Inactive Courses/Terms"** and change Content Status to **"Incomplete"**
3. Choose your desired **Date Range**
4. Click **Submit** and your report will generate on screen for customization and export

Helpful Hint: Running a big report or just want an export with all fields automatically? Instead of clicking Submit after selecting your filters, click **Export Offline Report** at the top of the Offline Reportings page to export directly to an Excel document without first displaying an onscreen report. All columns will be included in the export.

IMPORTANT: For incomplete courses, the Date Range will only apply if a student has started a course triggering a start date. If a student has not started the course, it will appear on this report REGARDLESS of enrollment date. For example, a student was enrolled in Professional Boundaries in 2023. The course was never started by the student but the course is still active in your LMS. It will still show as an incomplete course on this report regardless of the date range as the course doesn't have a "start date". **Course Reports** are typically a better option than Offline Reportings to report on incomplete courses within the LMS as they provide a progress meter.

Customizing Reports

Once you've submitted and generated your report, you can customize how it appears. **Report defaults will always include fields required for 245D records such as Date, Title, Facilitator, Duration, and Grade.**



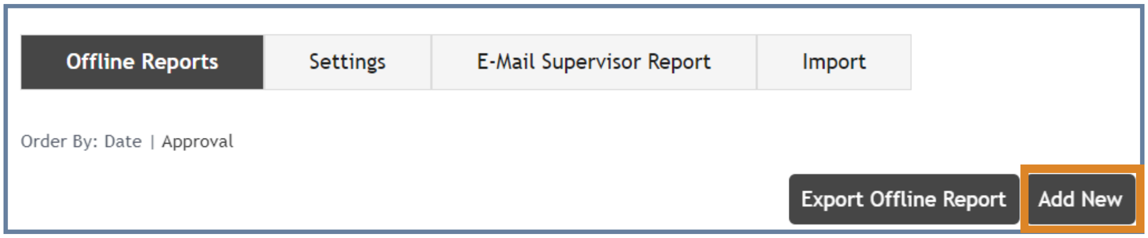
1. Change column visibility to adjust which fields display on the report
2. Copy the rows (to paste another program like email) or export to Excel or PDF. Whatever columns are displaying will be included in the export
3. Use the Search bar to search the onscreen results
4. Use the filters at the bottom to filter by a specific column

Adding Offline Trainings

Home tab → **Reports** → **Offline Reportings**

Offline Trainings are training that occurred outside of the LMS. This feature allows you to store all of your training records within the LMS so you can run transcripts for all training, regardless of on/offline status.

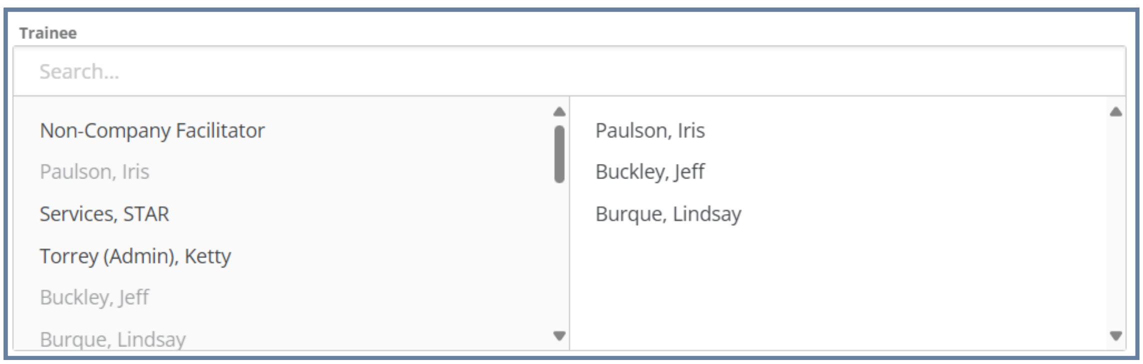
1. Click **Add New** to add a new Offline Training



2. Search for a user or select from list

Click on the user(s) to move from from the left column (user list) to the right column (attendee list) or back

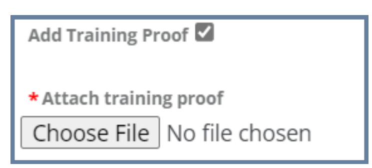
Records can be added for ACTIVE users only



3. Choose the **Facilitator** from your user list or choose Non-Company Facilitator. **NOTE:** As 245D requires the facilitator to be listed as part of the training record, be sure to name the facilitator in the Notes field
4. Select the **Format**, **Source**, and **New Hire** options. An N/A option is available
5. Enter the **Date** of the training (time is optional)
6. Select the **Type** of training. An N/A option is available
7. Select the **Duration** of the training
8. Enter a **Grade**, if applicable. This is not a required field

ADDING GRADES FOR MULTIPLE STAFF: If adding a training record in bulk, a single grade must be set for all students. We recommend setting the grade to the lowest passing grade. To facilitate access to the individual grades in the future, upload the documentation as Training Proof.

9. Select a **Title** or enter a new one by choosing "Other" and entering the title into the new field that appears
10. Add **Notes**, as needed
11. Add optional **Training Proof**, if you would like to attach documentation
    Accepted file extensions: jpg, jpeg, gif, png, pdf
12. Click **Save**



Note: If Offline Training Proof isn't enabled in your LMS, you can toggle this feature on by going to **Admin tab -> Config & Settings -> General Settings -> Offline Training Proof**

Records & Reporting

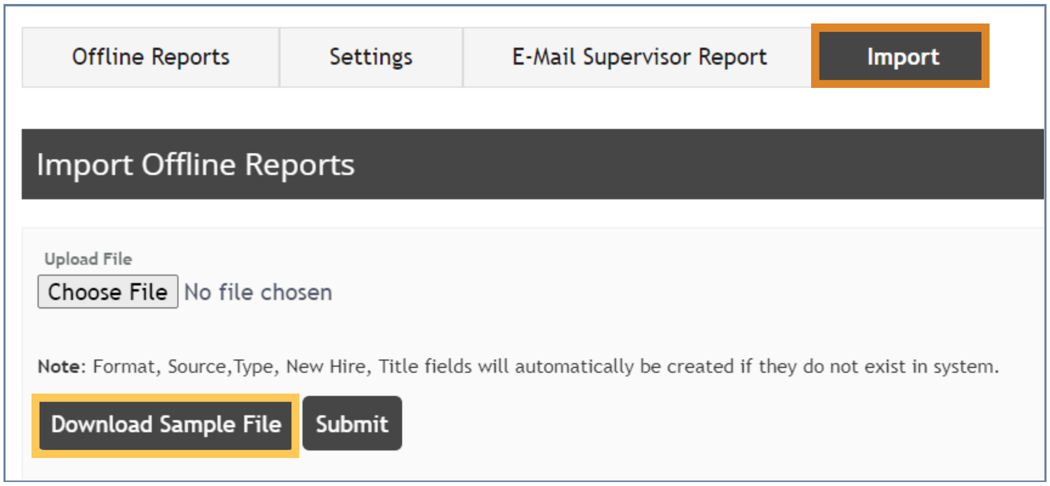
Importing Offline Trainings

Home tab → **Reports** → **Offline Reportings** → **Import**

Click the **Import** tab in Offline Reportings to import offline trainings in bulk

From here, you can **download a sample file** with the required fields for import

Note: You cannot upload training proof to accompany the record via import



Import Tips

A	B	C	D	E	F	G	H	I	J	K	L
User Id	Facilitator Id	Format	Source	Type	New Hire	Date	Duration	Title	Approved	Grade	Notes
ABCXYZ_ipaulson	starsvcs	Offline	245D: Individual Service Recipient Needs	CPR/First Aid	60 days	8/1/2024	5	American Heart Association Heartsaver CPR AED and First Aid	1		two year certification
ABCXYZ_jbuckley	starsvcs	Offline	245D: Individual Service Recipient Needs	CPR/First Aid	60 days	8/1/2024	5	American Heart Association Heartsaver CPR AED and First Aid	1		two year certification

- **Columns A (User ID) through J (Approved)** are **REQUIRED**. Use a value of **N/A** if the field is not applicable
- **Column A (User ID)** - only ACTIVE users are eligible for import. You must use the User ID for the student, not their name
- **Column B (Facilitator ID)** - use a value of **-1** for a Non-Company Facilitator. Otherwise, use the User ID for the facilitator, not their name
- **Column H (Duration)** - quarter hour increments with decimals. For example: 2, 4.25, 1.75, 0.5
- **Column J (Approved)** - Use **1** for Approved, **0** for Unapproved
- **Column K (Grade)** - accepts numbers with up to two decimal places. For example: 100 or 94.56
- **Column L (Notes)** - limited to 255 characters. If using Non-Company Facilitator, include facilitator name in the notes

Once the file has been prepared, use the **Choose File** button to select the file and **Submit**

NOTE: The file used for import must be saved as a .csv (comma separated values) file

IMPORTANT: Once the file has been imported, check the log for errors. If there are errors, please take a SCREENSHOT of the entire log. **Records that did not contain errors were imported**. You'll need to correct only the rows with errors and **re-import only those records**. Contact the Help Desk if you need assistance.

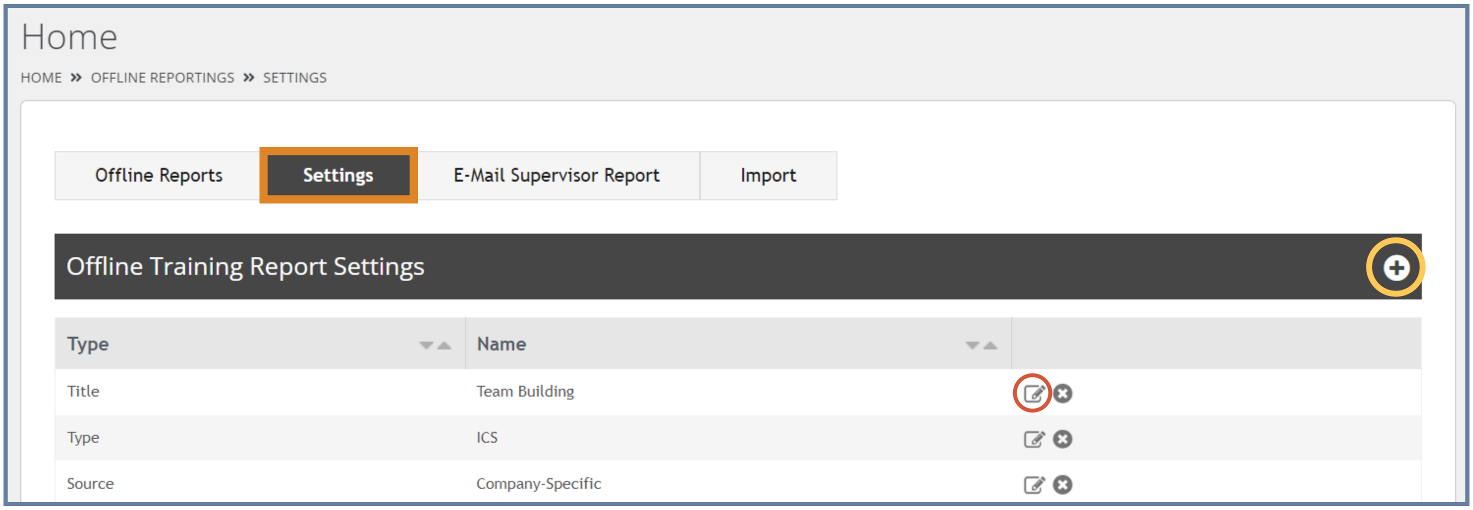
STAR SERVICES

Records & Reporting

Offline Reporting Settings

Home tab → **Reports** → **Offline Reportings** → **Settings**

The **Settings** tab in Offline Reportings allows you to add additional options to the drop down menus for Source, Type, Format, New Hire, and Title. These settings can be added to Offline Trainings as well as your own custom content to allow for additional filtering. **Note:** Titles can also be set-up while adding new Offline Training records



Adding a New Setting

1. Click the **PLUS** button
2. Fill in the **Name**
3. Select the setting **Type** to associate it with
4. **Save**

Editing Existing Settings

1. Click the **Edit** button
2. Change the **Name**, the associated **Type**, and/or the **Status**
3. **Save**

IMPORTANT: Making a setting inactive will leave it associated with past training records, but it will no longer appear in the dropdown menus to select in the future. Deleting a setting will disassociate it from existing records in addition to removing it from dropdown menu selections.

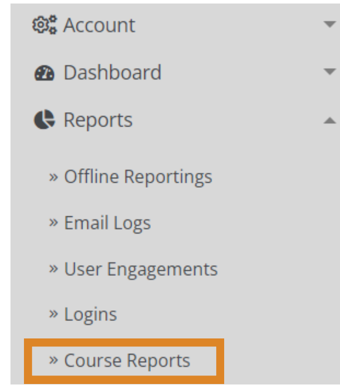
STAR SERVICES

Records & Reporting

Course Reports – Administrator

Home tab → **Reports** → **Course Reports**
Admin tab → **Reports** → **Course Reports**

Administrator-level Course Reports can be accessed from the Home tab or the Admin tab as you may choose to give users with limited administrator privileges access to these reports without granting access to the Admin tab



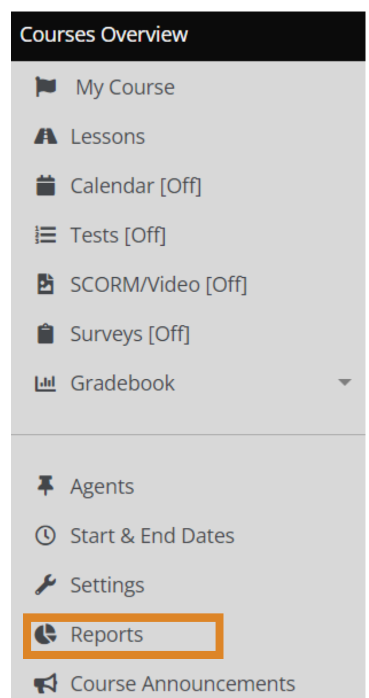
Course Reports allow you to track student data individually or for all students enrolled in specific course(s) to allow for the monitoring of compliance.

The most commonly used administrator-level Course Reports are

- **Course Completion** - view current completion status, progress percentage, and completion date, if applicable. Sorted by student or course
- **SCORM Report** - view the start time, end time, and total elapsed time by student within a SCORM file to ensure that students are completing course material
- **Time Taken on Lessons** - shows the sum of the time in minutes from when a student first enters a lesson item to the time the student marks that lesson complete

Course Reports – Course Level

Courses tab → **Term** → **Course** → **Reports**



There are additional **Course Reports** that are only available at the course level and cannot be run on multiple courses at the same time. With the exception of not needing to select courses, they function the same way as administrator-level Course Reports.

The most commonly used Course Reports available at the course-level only are

- **Time Taken on Tests** - shows the amount of time a student spent taking a test along with the start time and end time
- **Test Stats** - comprehensive test statistics including final scores by student, overall test stats such as average and median scores, percentages of students who answered each question correctly, distractor analysis, and a discrimination index. Allows for the identification of competency issues
- **Test Detail** - test scores by student and a listing of which questions were answered correctly by students. Allows for the identification of knowledge gaps
- **Course Logins & Page Views** - shows when a student was active and what was accessed within the course. Shows page URL and date visited. See also User Engagements

Records & Reporting

Running Course Reports

Home tab → **Reports** → **Course Reports (Admin-level)**

Courses tab → **Term** → **Course** → **Reports (Course-level)**

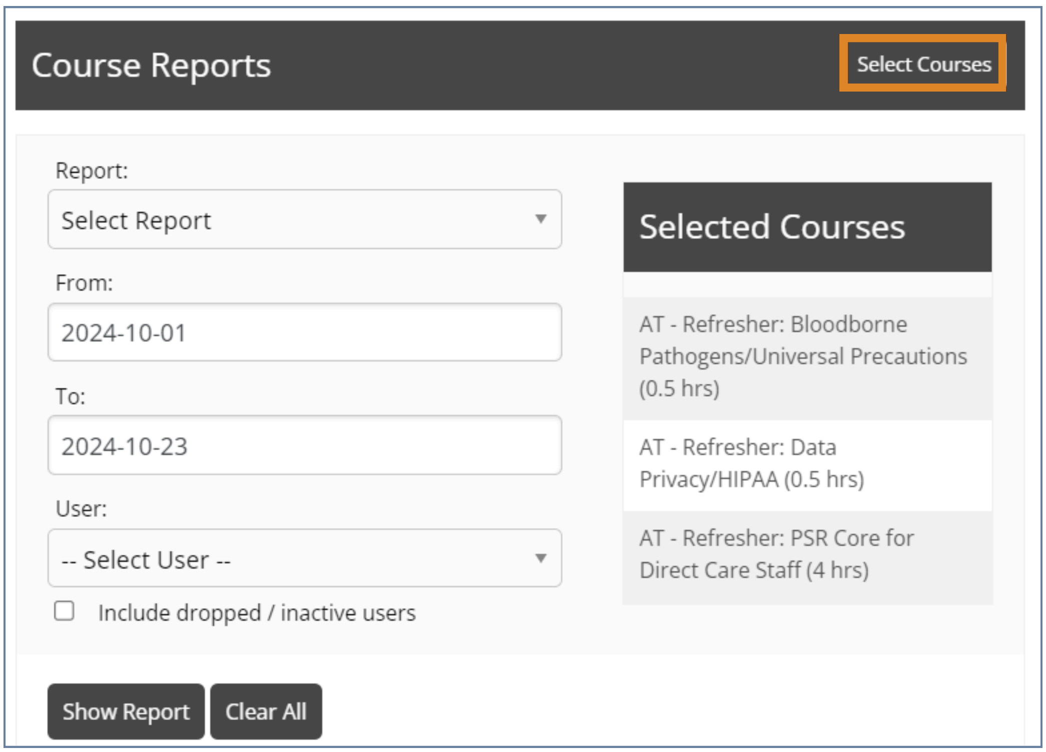
At the Admin-level, Course Reports can be run on multiple courses at the same time. They are ideal for checking on staff progress with orientation or annual training. The process outlined below is the same for course-level Course Reports except you will start on Step 3.

1. To run Course Reports, you first need to **Select Courses**

2. Select the Term from the list and then select the Courses you want to report on. You can mix and match Courses from different Terms. When done, click **Update Courses**

3. Select the report you wish to run, set the **date range***, and select a specific user or choose to run on all. Some reports may generate additional options

4. Click **Show Report** to generate onscreen or **Export Report** to export directly to Excel



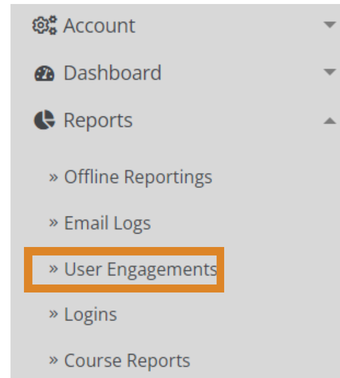
Once the report is generated, you'll have the same customization and export options as in Offline Reportings

***WARNING ON DATE RANGES**
The report will generate using activity that occurred ONLY within the selected date range. For example, if a student finished viewing a lesson on 8/31/2024 and the date range begins 9/1/2024, you will see no activity for the student because it's outside of the specified date range.

Records & Reporting

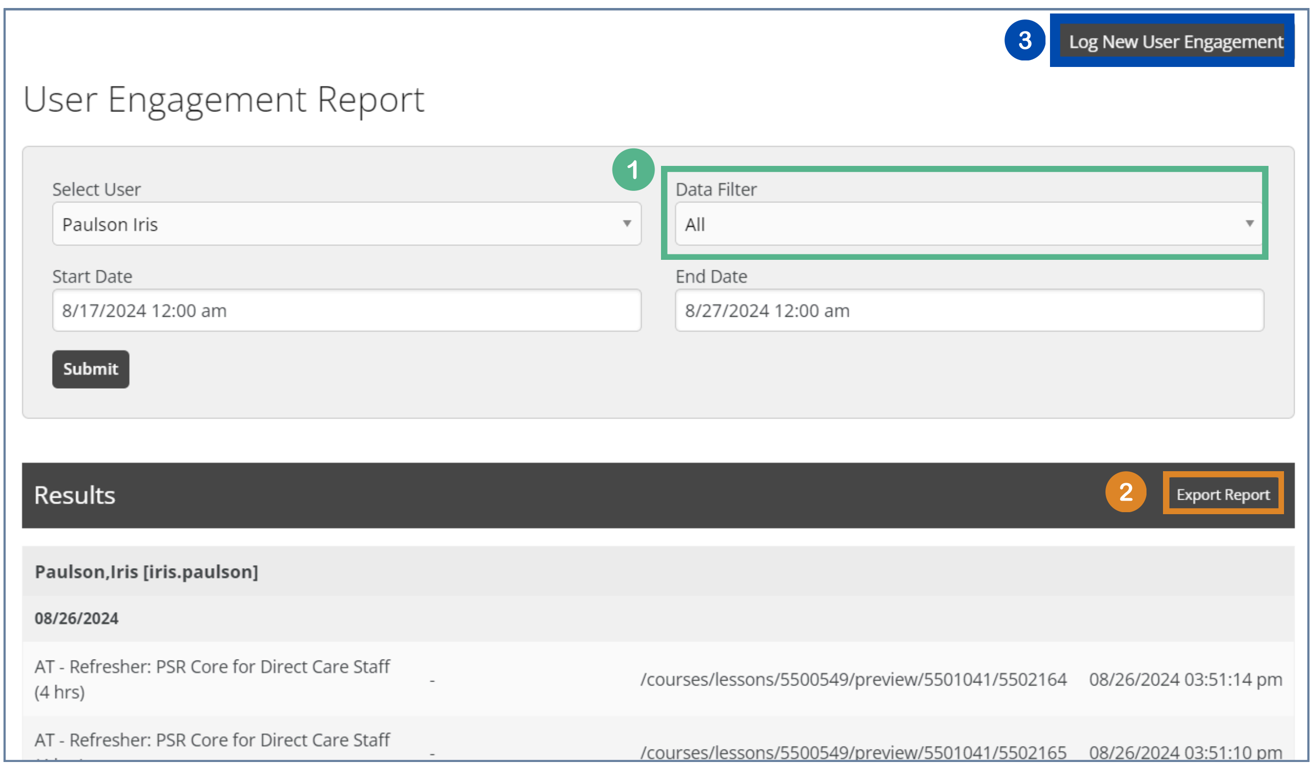
User Engagements

Home tab → **Reports** → **User Engagements**
Admin tab → **Reports** → **User Engagements**



The **User Engagements** reports is a log of activity by user within the LMS. This report can be used to view logs of Page Views, Mail Messages, and manual log entries.

A log entry of page views (from browser cookie activity) is made for each page movement/refresh within the LMS. If a student logs out, there is an engagement. If the browser window is just closed, the LMS doesn't get another "hit" and there is no further engagement. The User Engagement report shows the web address of each page visited by the user along with a time/date stamp. Page views within courses include the course title.



1. Filter engagements to show only page views, manual log entries, or mail messages
2. Export the report in spreadsheet format
3. Log new User Engagements manually

Note: Admins trying to determine how much time a student spent in a video should use the *SCORM Report* in Course Reports

Records & Reporting

User Engagements Page Views Cheat Sheet

Home tab → **Reports** → **User Engagements**

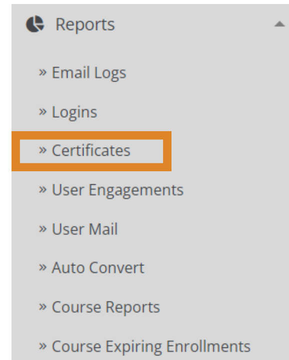
Many common page views are listed below along with the description of the page type it references. If you append any of the page view addresses listed on the User Engagements report to **https://v9.edvance360.com**, you will open the exact page opened by the user.

Page	**Description**
/courses	Courses tab
/grades/my-certificates	Scores tab
/admin/user/switch/#########	An admin user logged into the account using the switch user function
/courses/course/######	Course Overview page
/courses/lessons/######	Main/first lesson page within a course
/courses/lessons/#######/preview/#######	Lesson page with the first piece of lesson content
/courses/lessons/#####/preview/########/########	Lesson page with more than one piece of content (another set of #s is appended)
/add-lesson-progress/######/######	Indicates marking the item complete or clicking the next button to proceed
/courses/tests/########/student-test	Test launch page
/courses/tests/#########/student-test-questions/##########/0/0/1	Test page (taking the test)
courses/tests/#######/student-test-score/#########/0/0/1/FinishTest	Test submission page
/courses/tests/##########/review-test/#########/0/0/1	Test review page
/courses/course-complete/#######	Course completion page

Records & Reporting

Certificates

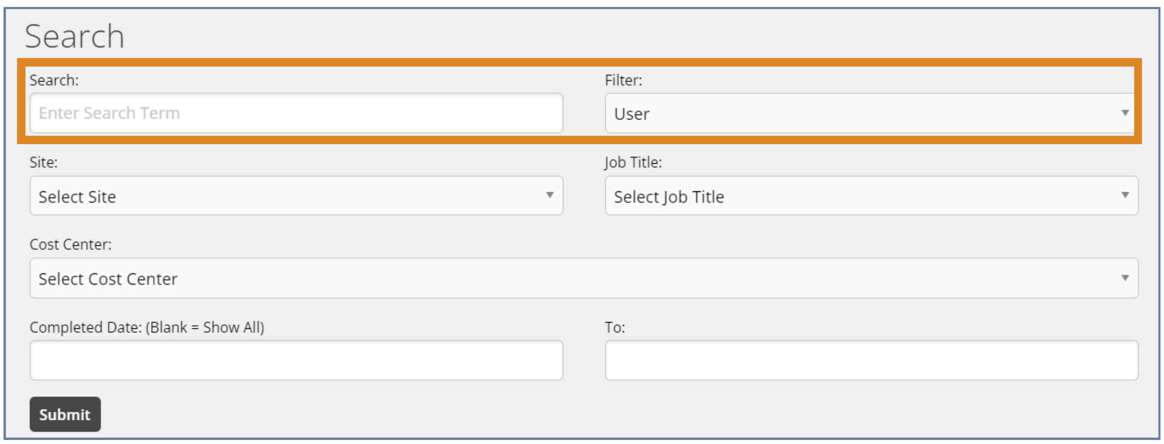
Admin tab → **Reports** → **Certificates**



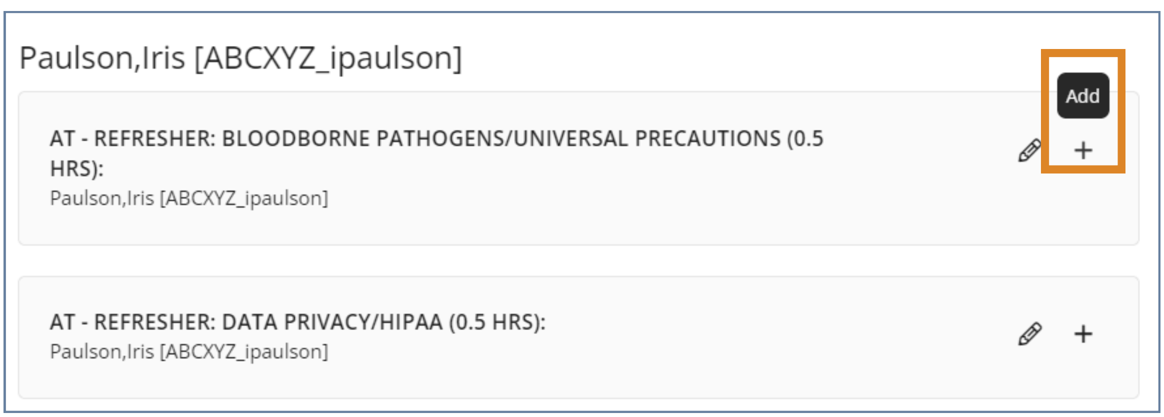
Certificates can be generated at any time for continuing education courses completed within the LMS. Depending on your organization's LMS settings, students may or may not be able to print their own certificates.

Note: The feedback we have heard from DHS is that reports/transcripts are preferable to certificates for training record documentation as they are easier to read through quickly. **245D does not require training certificates!**

1. In most cases, you will want to set the **Filter** field to "User" and then set your **Search** parameters. If searching by name, use either the first OR last name for the student

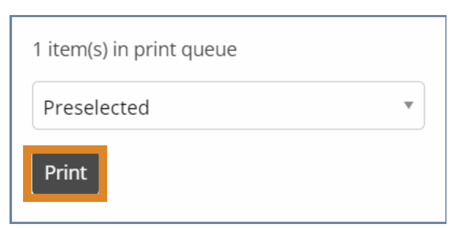


2. Click the **+ icon** to add a certificate to the print queue. Certificates from multiple searches can be added to the the queue together before printing



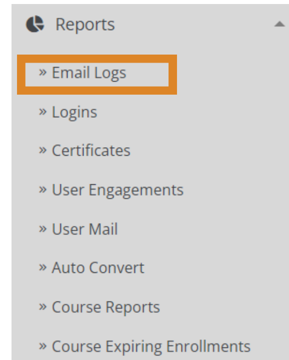
3. Once you have selected your desired certificates, click **Print**. Certificates will open for printing in a new browser window

Note: You may want to adjust your browser's Print Settings such a paper orientation and margins before printing



Records & Reporting

Email Logs

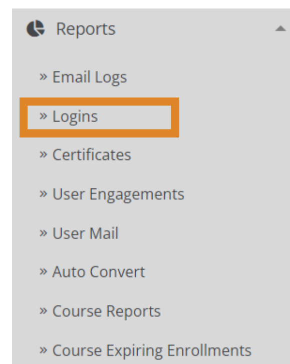


Admin tab → **Reports** → **Email Logs**
Home tab → **Reports** → **Email Logs**

Emails Logs allow you to view log reports of all emails within a specified date range

Sample Usage: A student indicates that they didn't receive a message and you want to verify that it was sent

Logins

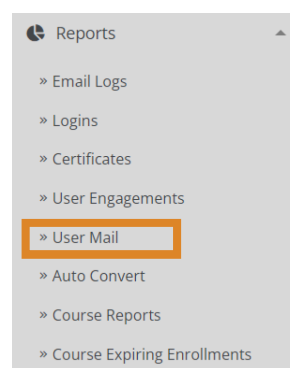


Admin tab → **Reports** → **Logins**
Home tab → **Reports** → **Logins**

View report of all LMS logins with start/end time, user, and role. Exportable

Sample Usage: You want to see all users who logged into the LMS within a specified time period

User Mail



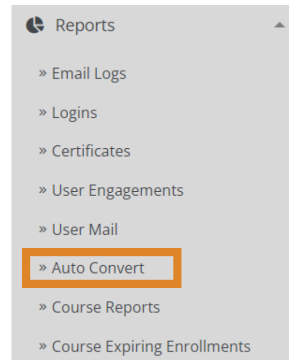
Admin tab → **Reports** → **User Mail**

View all messages sent within the LMS by a single user or all users, search term, and date range. Exportable

Sample Usage: You want to verify that a specific supervisor has been communicating with their direct reports about upcoming trainings

Auto Convert Logs

Admin tab → **Reports** → **Auto Convert**

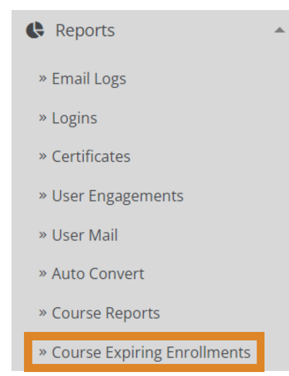


The **Auto Convert** logs allow you to review a list of users who have been automatically converted from an active user to inactive or alumni and rollback conversions if needed. Click on the log entry to view details and initiate rollback

This setting is disabled in most sites. See also *Course Expiration/Auto Convert Settings* in the **User Management & Enrollments** guide

Course Expiring Enrollments

Admin tab → **Reports** → **Course Expiring Enrollments**



The **Course Expiring Enrollments** report allows you to view all students/courses with upcoming expiring enrollments and grant extensions. Exportable

This setting is unused in most sites. See *Expiring Enrollments* in the **User Management & Enrollments** guide for more information including instructions for using this feature