Accessing and Exporting TRAIN Florida Reports for Administrators

Prepared. OnTrack. Online

Section 1 – TRAIN Florida Reports

The Florida Department of Health is committed to meeting your training needs. This document was designed to provide TRAIN Florida Administrators, with the Report Manager role, information to help you access and create TRAIN Florida canned reports regarding users and courses, as well as how to manage, and download TRAIN Florida data reports and exports.

The following sections will help you, as a TRAIN Florida Administrator, to access and create canned and Ad-hoc reports and to generate TRAIN Florida data reports and exports.

If the training data is not available in TRAIN Florida or you have a special report request, please use the TRAIN Florida Report Request Form to submit your request to DOH LMS Support.

NOTE: If an employee is not reflected on a report, they may have incorrect information in their TRAIN Florida learner account details, and/or be incorrectly grouped. You may need to review and update their learner account Details and Groups pages.

Section 2 – Accessing TRAIN Florida Reports

To Access the TRAIN Florida Reports Feature You Must Have the Report Manager Role:

- Assigned at the Florida level - shows data on all Florida learners
- Assigned at the local level - shows data only for learners within your organization level

Step 1: Log into TRAIN Florida (https://fl.train.org/)

Step 1: After you have successfully logged in - From your **TRAIN Florida home page** - Click on the **Administration** link in the top navigation bar. (Fig. 1).

Figure 1

Step 2: You will be directed to the **Administration Console** page (Fig. 2). This page lists all of your Administration Features and gives you access to the TRAIN Florida Reports link. Click the **plus sign** ⊞ next to **Reports**, to display the Reports menu options.

Figure 2

Step 3: The **Reports menu** will expand (Fig. 3) and display a list of reports available in TRAIN Florida. Click on **Report Console** to access the TRAIN Florida canned and Ad-Hoc reports.

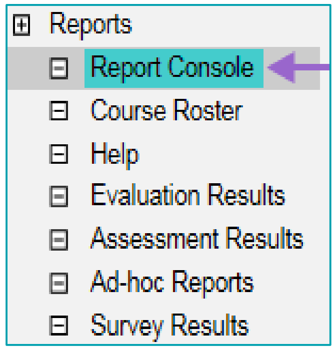


Figure 3

Step 4: The **Report Console** page will open (Fig. 4). This page gives you access to create a report or export data on users and courses.

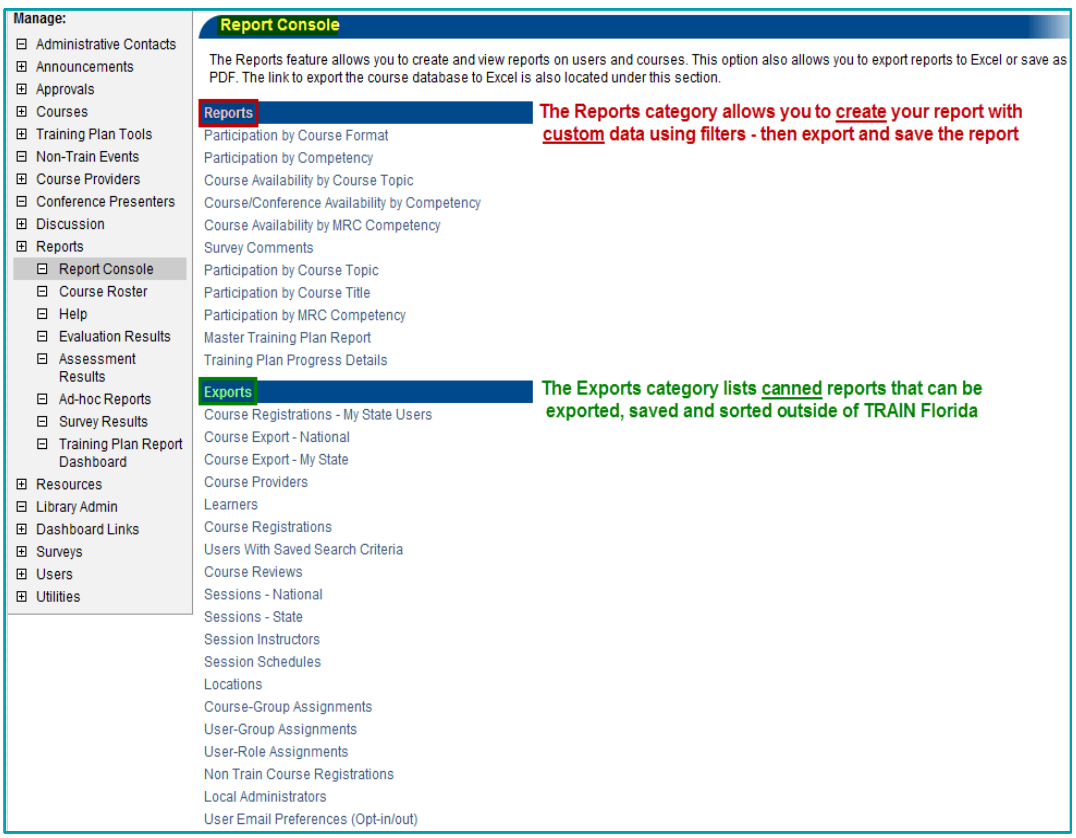


Figure 4

Reports: The Reports category allows you to create your report with custom data using filters. You have the option then to export the report, and save it to your computer. **Section 3** of this document details steps on how to run the reports in this category.

Exports: The Exports category lists canned reports that are designed to be exported as an Excel file, saved to your computer and sorted to your needs, outside of TRAIN Florida. Section 4 of this document details steps on how to run the reports in this category.

Section 3 – The Reports Category

Step 1: **From the Report Console page** – **Reports** category list - Locate and click on the report link you are interested in running, for example - **Participation by Course Format** (Fig. 5).

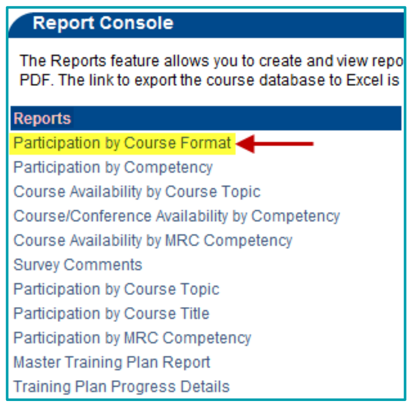


Figure 5

Step 2: The **report window** will open in a new browser window (Fig. 6). The window will display a series of fields that allow you to filter the data for your report.

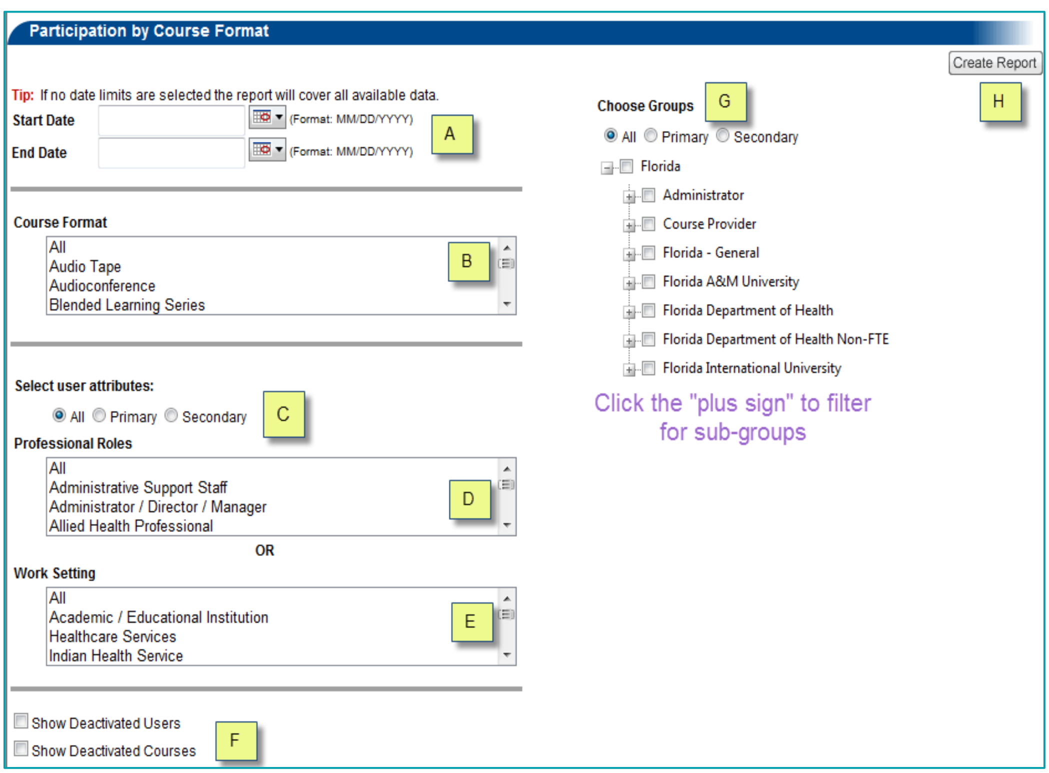


Figure 6

The following steps are a sample guide to the report filter features using the **Participation by Course Format** report (Fig. 6). **NOTE:** the filter features may vary from report to report.

A. Enter the **Start** and **End Dates** - MM/DD/YYYY - or use the calendar and select your date parameters. **NOTE:** if no date limits are set, the report will cover all available data.

B. Choose the **Course Format** - Use the scroll bar and click to highlight the course type.

C. **Select user attributes:**
  All - returns all learners professional roles and work setting attributes
  Primary - returns only those learners who selected an attribute as their primary professional role or work setting.
  Secondary - returns only those learners who selected an attribute as their secondary professional role or work setting.

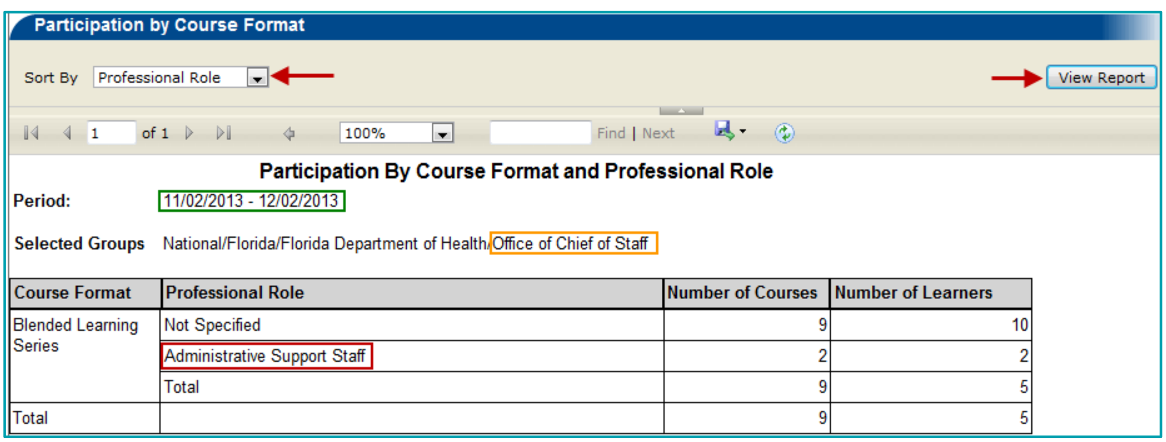
D. **Select a Professional Role** - Use the scroll bar and click to highlight. Hold the Control key and click to select multiple roles. **OR** **Select the Work Setting** - Use the scroll bar and click to highlight. Hold the Control key to select multiple work settings.

E. Choose to Show Deactivated Users and/or Courses can also be included by clicking the boxes next to the choices if appropriate.

F. **Choose Groups** – select the groups you wish to include on the report by clicking to **check the box** and clicking the **plus sign** to open the menus and filter for sub-groups.
  NOTE: to filter a group that should reflect only staff members of a certain location, select Primary before choosing your groups.

G. Click the **Create Report** [Create Report] button located in the upper right corner of the page to run the report. **NOTE:** the report may take a little time to run depending on the amount of data requested.

Step 3: When the system completes the data collection it will open the report (Fig. 7).



Course Format	Professional Role	Number of Courses	Number of Learners
Blended Learning Series	Not Specified	9	10
	Administrative Support Staff	2	2
	Total	9	5
Total		9	5

Figure 7

In this sample (Fig. 7)**:**

- The report Period was 11/25/2013 to 12/27/2013
- The Selected Group was the Office of Chief of Staff – Primary
- The Professional Role chosen was Administrative Support Staff

This report can be sorted, before exporting. Choose the option from the **Sort By** drop-down menu, then click the **View Report** View Report button to refresh the screen and re-sort the data.

Step 4: To download and save your report results – locate and click on the **Save/Export** icon to download the file in the format of your choice (Fig. 8).

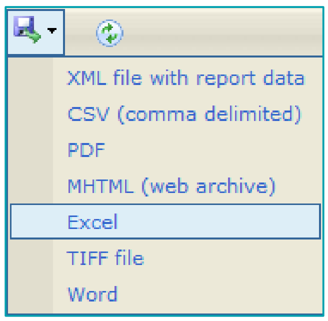


Figure 8

- Click on the **Save/Export** icon - Scroll down the drop down menu and click on the format for your file.
- The **File Download** window will open - Click the **Save** Save button.
- The **Save As** window will open – Enter the report name in the **File name** field – Then locate and save the file to a folder on your computer by clicking the **Save** Save button.

Step 5: After you have saved the report - Close the report browser window by clicking on the **X** in the window tab (Fig. 9).

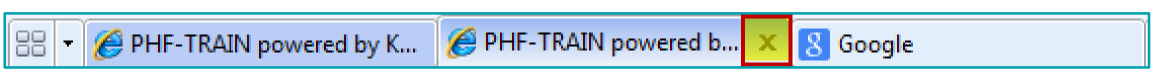


Figure 9

The window will close and you will be returned to the Report Console page.

Section 4 – The Exports Category

Step 1: **From the Report Console page** – **Exports** category list - Locate and click on the canned report link you are interested in running, for example - **Learners** (Fig.10).

Figure 10

- The **File Download** window will open - Click the **Save** [Save] button.
- The **Save As** window will open – Enter the report name in the **File name** field – Then locate and save the file to a folder on your computer, click the **Save** [Save] button.

Step 4: After clicking the Save button the report will begin to download to your chosen folder. **NOTE:** The download process may take time as it is dependent on the size of the report. When the report is finished downloading the **Download Complete** window will open (Fig. 11).

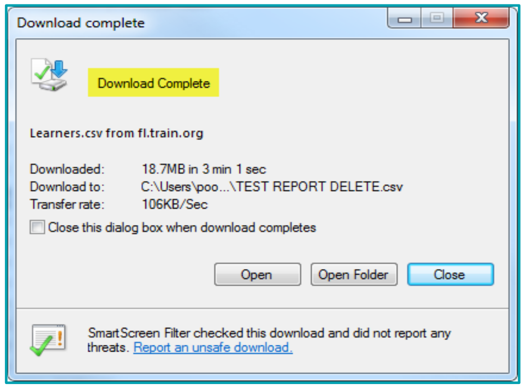


Figure 11

You have the option to **Open** the report, **Open the folder** where the report is saved or **Close** this window. If you choose to close the window, the report will be available in your computer and you will be returned to the Report Console page.

Section 5 – The Master Training Plan Report

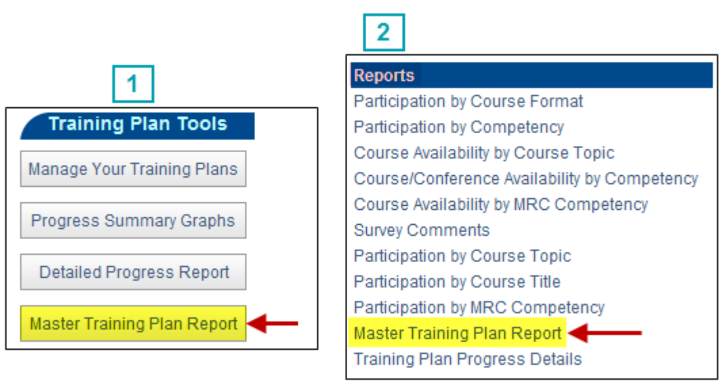
The following section will show you how to run, export and save a **Master Training Plan Report**.

The Master Training Plan Report allows you to report on learner status by completion or by creation dates. This report can be filtered by all users who can see the training plan or selected groups, and can include active or inactive employees.

<u>Access to this report can be found in two places in TRAIN Florida (Fig. 12):</u>

1. The Administrator's TRAIN Florida home page - **Training Plan Tools** menu
2. The Report Console – **Reports category** list

Figure 12



Step 1: Click on a Master Training Plan Report link. The **Course Availability by Course Topic** page will open in a new browser window (Fig. 13). The window will display a series of fields that allow you to filter the data for your report.

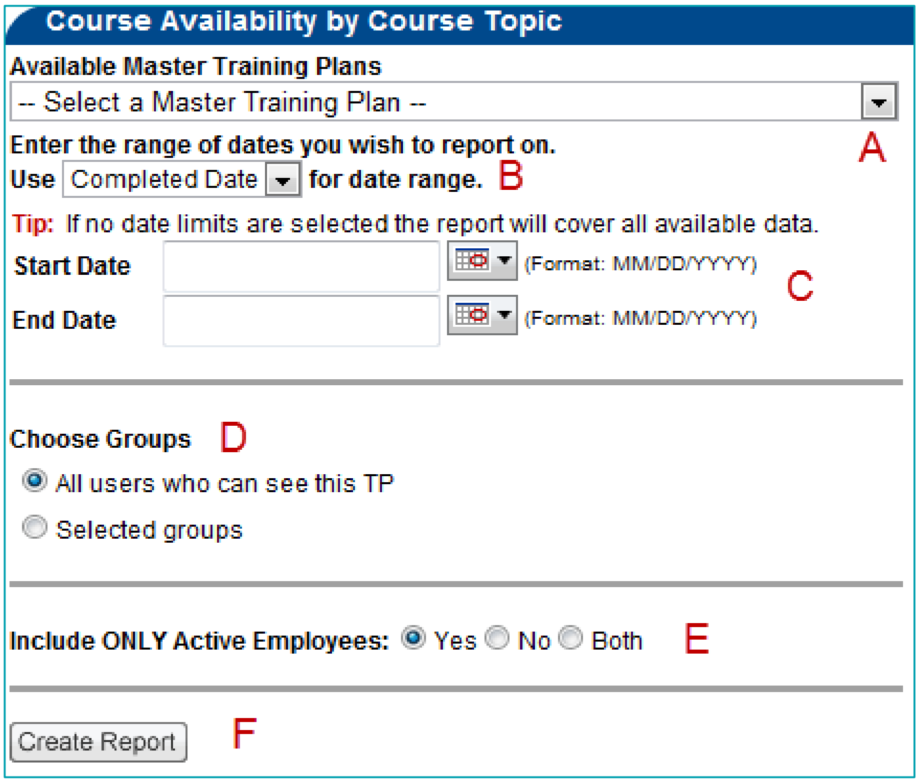


Figure 13

<u>The following steps will guide you on how to filter the data to run this report:</u>

A. **Select a Master Training Plan** – Use the drop down menu and click the title to select the training plan.

B. **Enter the report date range** – Use the drop down menu to filter by <u>Completed Date</u> or <u>Created Date.</u>

C. Enter the **Start** and **End Dates** – MM/DD/YYYY - or use the calendar and select your date parameters. **NOTE:** if no date limits are set, the report will cover all available data.

D. **Choose the groups** – The report <u>filter defaults to include all users</u> who can see the chosen training plan. You can choose to filter the report by specific groups – for example your location only. To filter by group click on the button next to **Selected Groups**.

The top most level of the groups menu will open (Fig. 14). Click on the **plus icon** next to Florida to open the next level - <u>do not check the Florida box</u>.

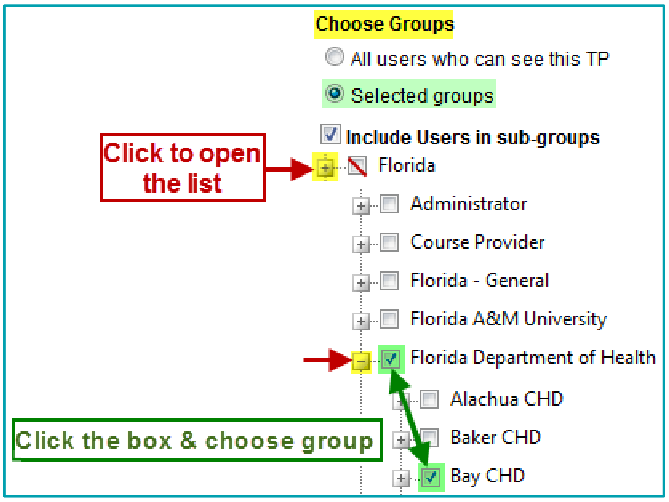


Figure 14

Scroll to locate the group you would like to add. Next, click on the **plus icon** next to the group name, to open any sub-level lists that may be available.
After locating the group or group levels you would like to add, click to **check the box** next to the group name. This will add the group(s) to your report.

E. **Choose who to include** – The report filter defaults to **Yes** which selects only active employees. To include only inactive employees click the button next to **No**. To include all active and inactive employees click the button next to **Both**.

F. After completing your parameters - Click the **Create Report** Create Report button at the bottom of the page, to run the report. **NOTE:** the report may take a little time to run depending on the amount of data requested.

Step 2: When the system completes the data collection it will open the report (Fig. 15).

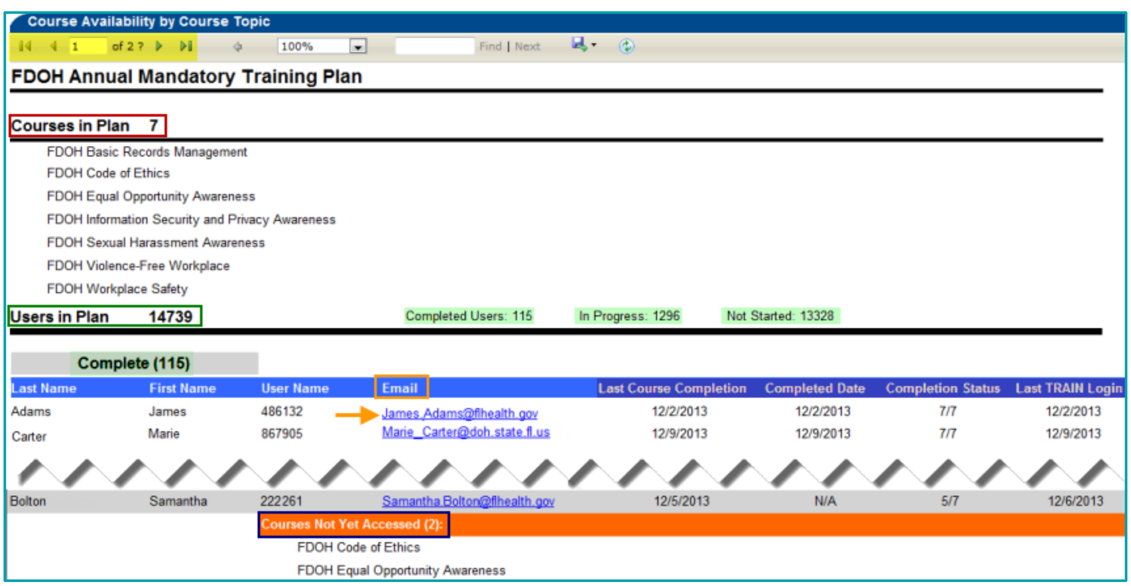


Figure 15

The **Master Training Plan Report** (Fig. 15) displays a comprehensive view of the following information:

- Provides navigation of the pages of the report. **NOTE:** to see the complete report while in TRAIN Florida, you will need to navigate through the pages
- Number of Courses in the Plan
- Number of Users in the Plan including Completed Users, In Progress and users Not Started
- The Last Course Completion date, Completed Date, Completion Status of the plan and the Last TRAIN Login date for the learner
- The Courses Not Yet Accessed in the plan by learners
- Provides the ability to e-mail the learner from the report by clicking on the e-mail address.

Step 3: To download and save your report results – locate and click on the **Save/Export** icon to download the file in the format of your choice (Fig. 16).

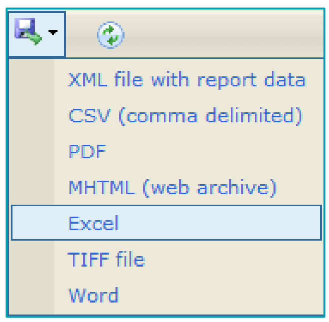
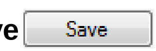


Figure 16

- Click on the **Save/Export** icon – Scroll down the drop down menu and click on the format for your file.
- The **File Download** window will open - Click the **Save**  button.
- The **Save As** window will open – Enter the report name in the **File name** field – Then locate and save the file to a folder on your computer by clicking the **Save**  button.

Step 4: After you have saved the report - Close the report browser window by clicking on the **X** in the window tab (Fig. 17).

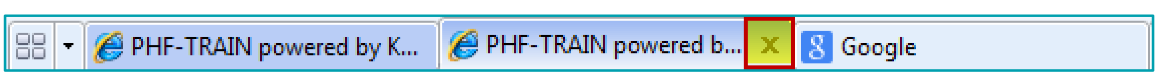


Figure 17

The window will close and you will be returned to the Report Console page.

Section 6 – The Training Plan Progress Details Report

The following section will show you how to run, export and save a **Training Plan Progress Details Report**.

The Training Plan Progress Details Report allows you to select a single or multiple Training Plans and view the progress of learners completions.

Access to this report can be found in two places in TRAIN Florida (Fig. 18):

1. The Administrator's TRAIN Florida home page - **Training Plan Tools** menu
2. The Report Console – **Reports category** list

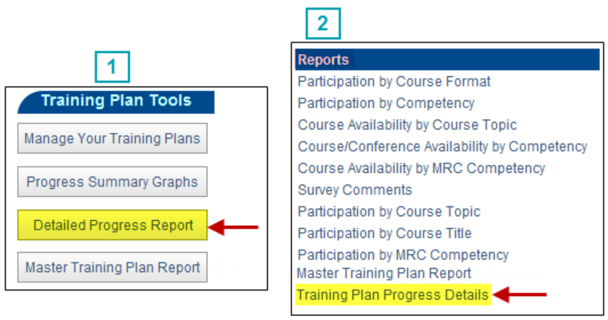


Figure 18

Step 1: Click on a Training Plan Progress Details link. The **Training Plan Progress Details** page will open in a new browser window (Fig. 19). The window will display a series of fields that allow you to filter the data for your report.

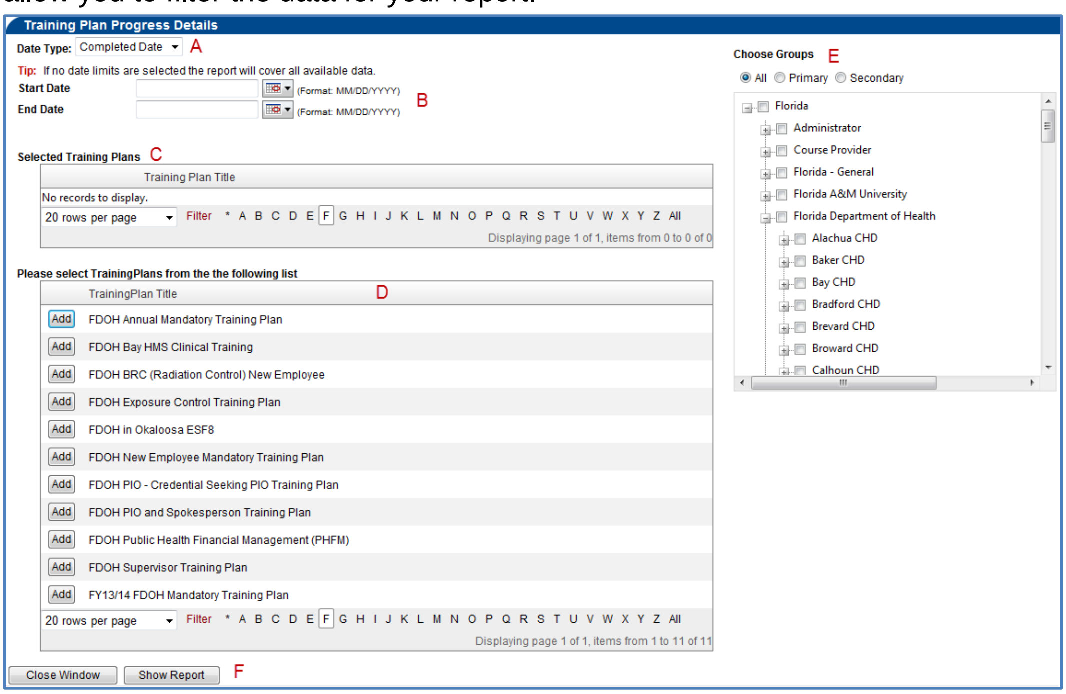


Figure 19

<u>The following steps will guide you on how to filter the data to run this report:</u>

A. Choose the **Date Type** – Use the dropdown box and select Completed Date or Assigned Date.

B. Enter the **Start** and **End Dates** – MM/DD/YYYY - or use the calendar and select your date parameters. **NOTE:** if no date limits are set, the report will cover all available data.

C. **Select the Training Plan(s)** – To add a training plan to the <u>Selected Training Plans</u> choose the title of the training plan from the list below this section **D**. This will move the selected training plan up to the Selected Training Plans list. (Fig. 20). If you wish to delete a selected plan, click the **Remove** button.

D. This section is the <u>list of available TRAIN Florida Training Plans</u>. Click the **Add** button next to the title to move the selected training plan to the Selected Training Plans list **C** (Fig. 20).

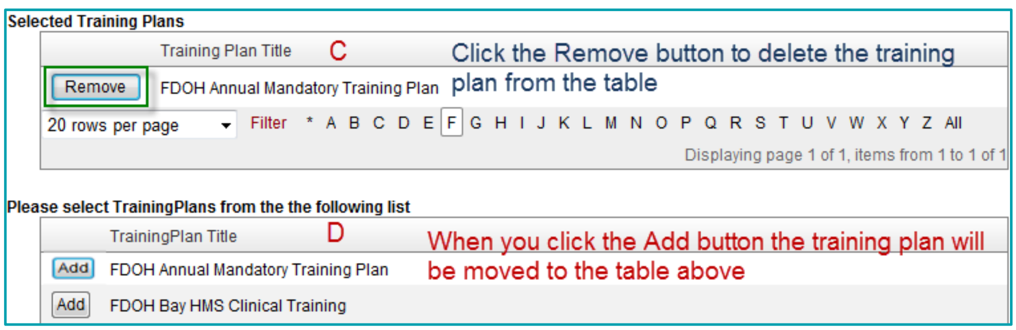


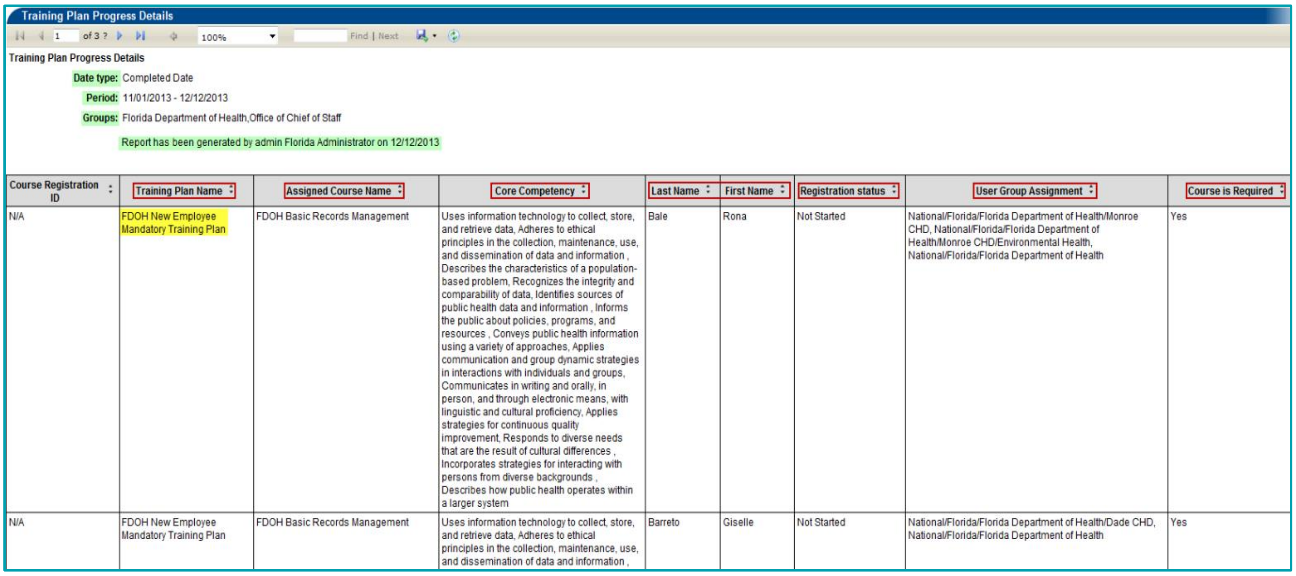
Figure 20

E. **Choose Groups** – select the groups you wish to include on the report by clicking to **check the box** and clicking the **plus sign** to open the menus and filter for sub-groups.

NOTE: to filter a group that should reflect only staff members of a certain location, select Primary before choosing your groups.

F. Click the **Show Report** button at the bottom of the page, to run the report. **NOTE:** the report may take a little time to run depending on the amount of data requested.

Step 2: When the system completes the data collection it will open the report (Fig. 21).


Training Plan Progress Details

1 of 3 ? 100% Find | Next

Training Plan Progress Details

Date type: Completed Date

Period: 11/01/2013 - 12/12/2013

Groups: Florida Department of Health,Office of Chief of Staff

Report has been generated by admin Florida Administrator on 12/12/2013

Course Registration ID	Training Plan Name	Assigned Course Name	Core Competency	Last Name	First Name	Registration status	User Group Assignment	Course is Required
N/A	FDOH New Employee Mandatory Training Plan	FDOH Basic Records Management	Uses information technology to collect, store, and retrieve data, Adheres to ethical principles in the collection, maintenance, use, and dissemination of data and information , Describes the characteristics of a population-based problem, Recognizes the integrity and comparability of data, Identifies sources of public health data and information , Informs the public about policies, programs, and resources , Conveys public health information using a variety of approaches, Applies communication and group dynamic strategies in interactions with individuals and groups, Communicates in writing and orally, in person, and through electronic means, with linguistic and cultural proficiency, Applies strategies for continuous quality improvement, Responds to diverse needs that are the result of cultural differences , Incorporates strategies for interacting with persons from diverse backgrounds , Describes how public health operates within a larger system	Bale	Rona	Not Started	National/Florida/Florida Department of Health/Monroe CHD, National/Florida/Florida Department of Health/Monroe CHD/Environmental Health, National/Florida/Florida Department of Health	Yes
N/A	FDOH New Employee Mandatory Training Plan	FDOH Basic Records Management	Uses information technology to collect, store, and retrieve data, Adheres to ethical principles in the collection, maintenance, use, and dissemination of data and information ,	Barreto	Giselle	Not Started	National/Florida/Florida Department of Health/Dade CHD, National/Florida/Florida Department of Health	Yes

Figure 21

The **Training Plan Progress Details Report** (Fig. 21) displays the following information:

- The Date type for the report
- The report Period
- The Group or Groups chosen for the report
- The Administrator that generated the report and the date it was run
- The earner's Course Registration ID (if applicable)
- The Training Plan Name
- The Assigned Course Name (the courses in the plan)
- The assigned Core Competencies
- The learner's First and Last Name.
- The course Registration Status
- The User Group Assignment
- Is the Course is Required – Yes/No

NOTE: If you need to alter the report parameters after the report is run click the **Change Report Parameters** Change Report Parameters button, located at the bottom of the page. It will take you back to the data filter page.

If you do not wish to save/export the report click the **Close Window** Close Window button.

Step 3: To download and save your report results – locate and click on the **Save/Export** icon to download the file in the format of your choice (Fig. 22).

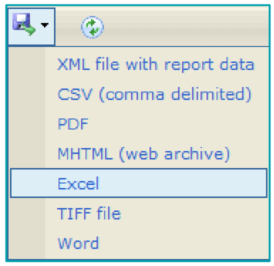


Figure 22

- Click on the **Save/Export** icon – Scroll down the drop down menu and click on the format for your file.
- The **File Download** window will open - Click the **Save** button.
- The **Save As** window will open – Enter the report name in the **File name** field – Then locate and save the file to a folder on your computer by clicking the **Save** button.

Step 4: After you have saved the report - Close the report browser window by clicking on the **X** in the window tab (Fig. 23), or the **Close Window** button at the bottom of the screen.

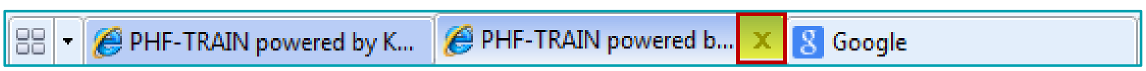


Figure 23

The window will close and you will be returned to the Report Console page.

Section 7 – The Course Roster Report

The following section will show you how to run, export and save a **Course Roster Report**.

The Course Roster Report allows you to view a roster for a single course, or for a group of courses within TRAIN Florida. It can be used to verify learner registrations. This report is export only, and must be saved to your computer to access and sort data.

Step 1: From the **Administration Console** page (Fig. 24). Click the **plus sign** ⊞ next to **Reports**, to display the Reports menu options.

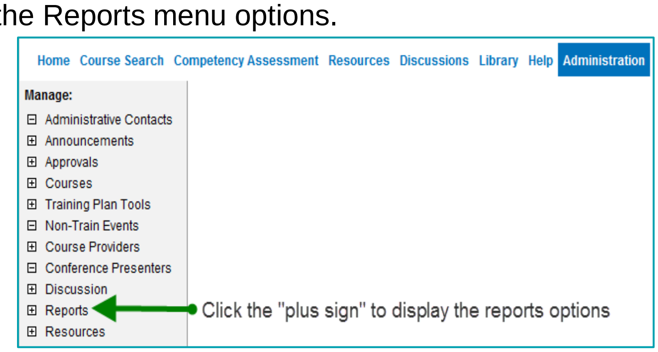


Figure 24

Step 2: From the Reports menu - Click on the **Course Roster** link (Fig. 25).
The reports window will refresh and display a link for you to generate the report (Fig.26).
Click on the **Click Here to Generate Export** link.

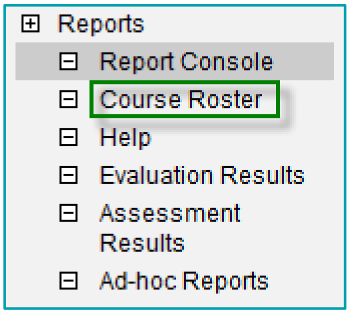


Figure 25

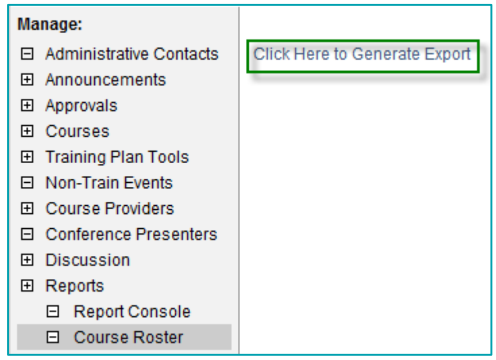


Figure 26

Step 3: The **List Registered Users by Course** page will open in a new browser window (Fig. 27). The window will display a series of fields that allow you to begin to filter the data for your roster report. It is recommended to click the box next to **Show only my state users** to assure only TRAIN Florida users are reflected on your report.

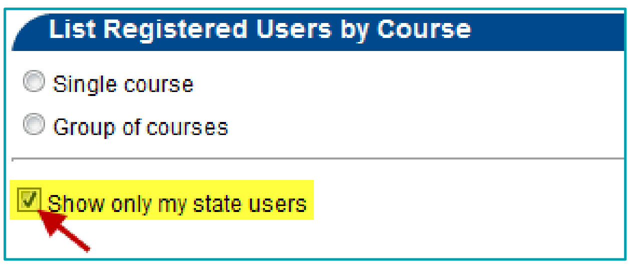


Figure 27

NOTE: Rosters can be run for a single course or a group of courses
Step 3-A gives instructions for a **Single Course** roster
Step 3-B gives instructions for a **Group of Courses** roster

A. Run, export and save a course roster for a **Single Course**

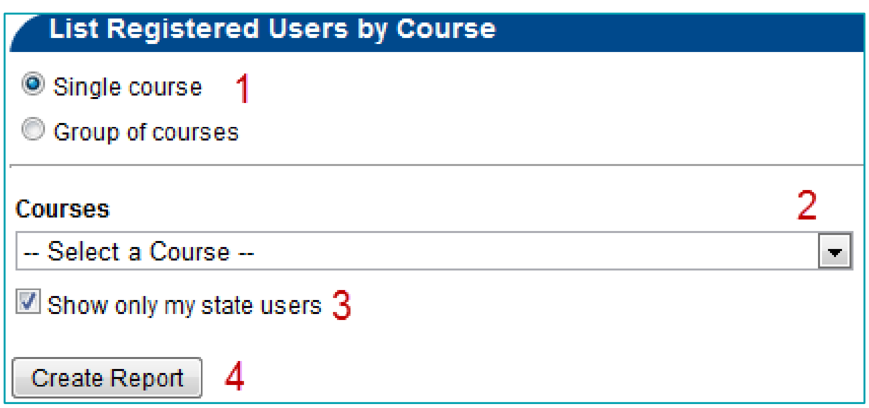


Figure 28

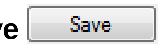
1. Click the button next to **Single course** to expand the filter (Fig. 28).

2. Choose your **Course** - Use the dropdown box, scroll down, locate your course and click on the title to choose. The courses are listed alphabetically.
   NOTE: All Department courses will have the acronym **FDOH** before the title. If the course is a Blended Learning Series, with sections, you must select the top level course to assure all learners who have registered in the course are shown.

3. Be sure the box next to **Show only my state users** is checked. This will to return only learners who have aTRAIN Florida account.

4. Click the **Create Report** 

 button to run the report.

   - The **File Download** window will open - Click the **Save** 

button.
   - The **Save As** window will open – Enter the report name in the **File name** field – Then locate and save the file to a folder on your computer, click the **Save** 

button.

After clicking the Save button the report will begin to download to your chosen folder. **NOTE:** The download process may take time as it is dependent on the size of the report. When the report is finished downloading the **Download Complete** window will open (Fig. 29).

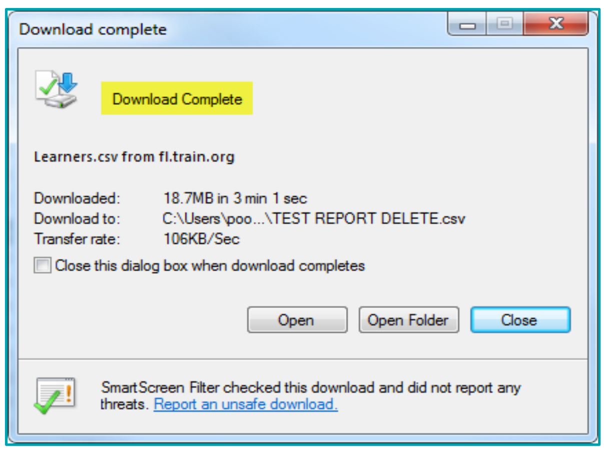


Figure 29

You have the option to **Open** the report, **Open the folder** where the report is saved or **Close** this window. If you choose to close the window, the report will be available in your computer and you will be returned to the report filter page.

To close the report browser window click on the **X** in the window tab (Fig. 30). The window will close and you will be returned to the Course Roster page.

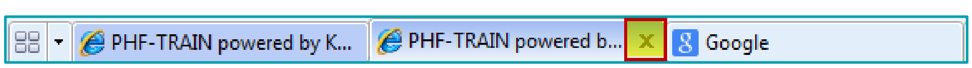


Figure 30

B. Run, export and save a course roster for a **Group of Courses**

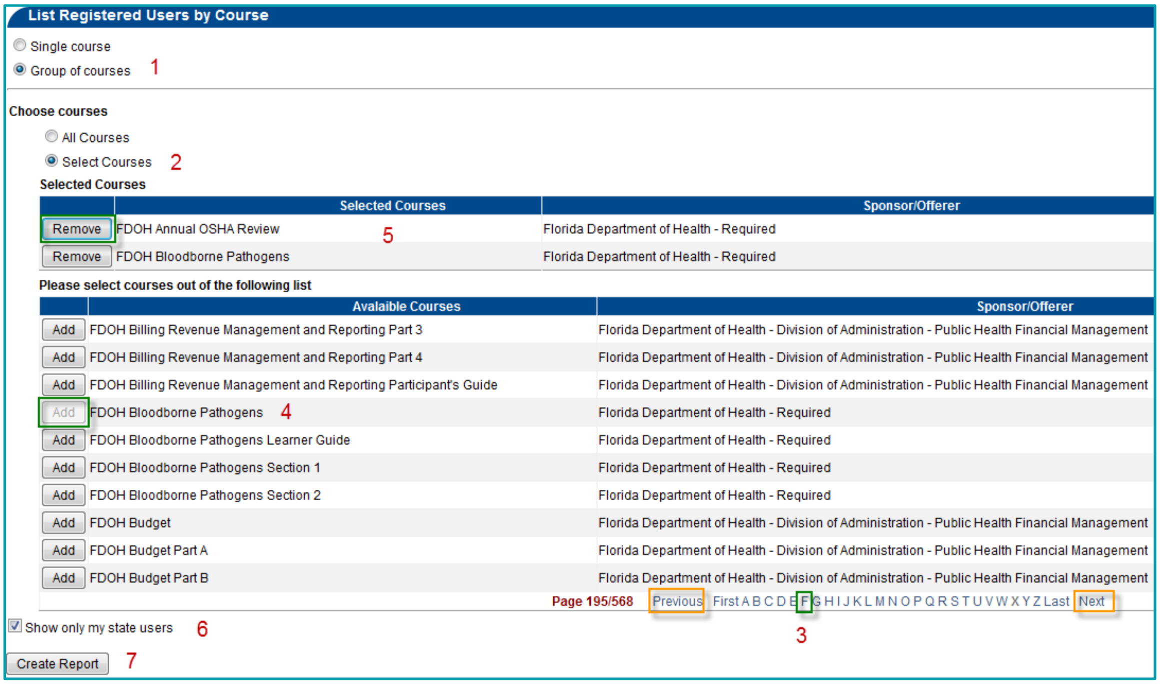


Figure 31

1. Click the button next to **Group of Courses** to expand the filter (Fig. 31)

2. Click the button next to **Select Courses**.

3. The **Selected Courses** menu will open – Go to the <u>letter filter bar</u> located at the bottom of the **Please select courses out of this list** table.
Click on the letter **F** to filter for Department courses. **NOTE:** <u>All Department courses will have the acronym **FDOH** before the title.</u> If the course is a Blended Learning Series, with sections, you must select the top level course to assure all learners who have registered in the course are shown.
<u>To navigate the F section</u> click either the the <u>Previous</u> or <u>Next</u> link to locate your course.

4. To choose the courses you wish to run - click the **Add** Add button next to the course titles. **NOTE:** You may choose as many courses as you need however the more data you request, the larger the report and longer it will take to run.

5. By clicking Add, the courses will be moved to the **Selected Courses** table.

6. Be sure the box next to **Show only my state users** is checked. This will to return only learners who have aTRAIN Florida account.

7. Click the **Create Report** Create Report button to run the report.
   - The **File Download** window will open - Click the **Save** Save button.
   - The **Save As** window will open – Enter the report name in the **File name** field – Then locate and save the file to a folder on your computer, click the **Save** Save button.

After clicking the Save button the report will begin to download to your chosen folder. **NOTE:** The download process may take time as it is dependent on the size of the report. When the report is finished downloading the **Download Complete** window will open (Fig. 32).

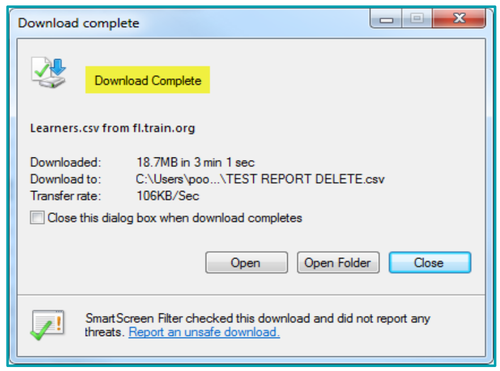


Figure 32

You have the option to **Open** the report, **Open the folder** where the report is saved or **Close** this window. If you choose to close the window, the report will be available in your computer and you will be returned to the report filter page.

To close the report browser window click on the **X** in the window tab (Fig. 33). The window will close and you will be returned to the Course Roster page.

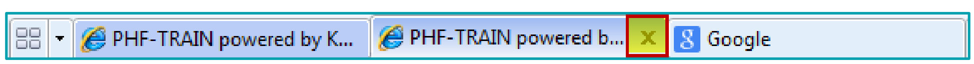


Figure 33

Section 8 – Ad-hoc Reports

The following section will show you how to run, export and save a **TRAIN Florida Ad-hoc Report**.

The Ad-hoc Report feature allows administrators to create and save custom reports for use at any time. Use this link to the **TRAIN Florida Ad-Hoc Reports** chart as a guide to the entire list of the Department's Ad-hoc reports. The reports are listed by title and include a description of the report and a listing of the report's visibility. This document can also be found on the TRAIN Florida Administrators Knowledge Center webpage.

NOTE: Filter features may vary from report to report. To return accurate results, please enter the requested Learner, Course and Group report parameters exactly as it is listed in TRAIN Florida.

Step 1: From the Reports menu - Click on the **Ad-hoc Reports** link (Fig. 34).

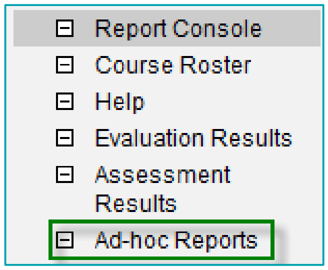


Figure 34

Step 2: The reports window will refresh and the **Ad-hoc Reports** page will open (Fig.35). Click on the button next to **All reports** to make all available reports visible.

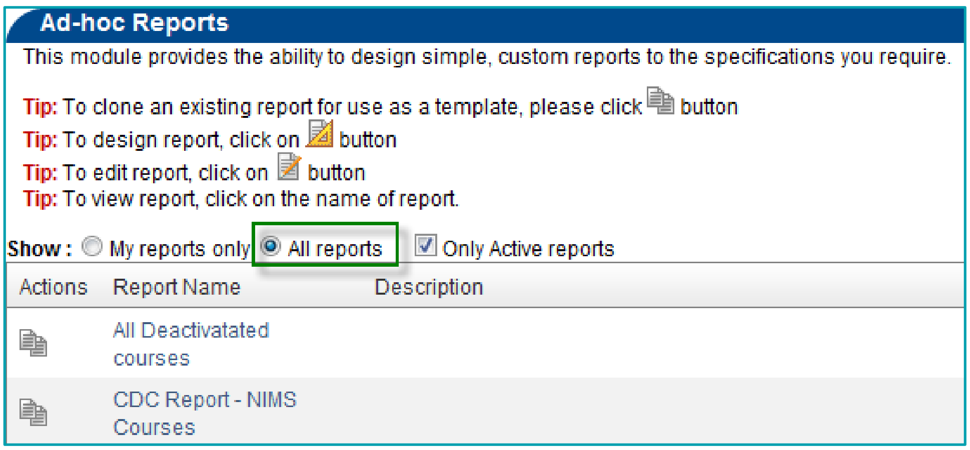


Figure 35

Step 3: <u>To see the complete list of TRAIN Florida Ad-hoc Reports</u> - Go to the <u>letter filter bar</u> located at the bottom of the list screen (Fig. 36). Use the dropdown box and select **50 rows per page**. Next, click on the letter **F** to filter for Department reports. The screen will refresh and show an alphabetical list of reports. **NOTE:** All Department reports will have the acronym **FDOH** before the title.

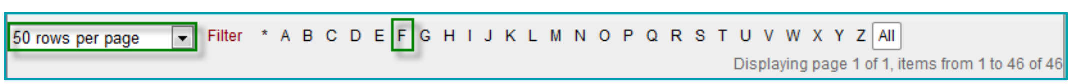


Figure 36

The list also includes a description of the information that will be automatically be included in each report.

Step 4: Locate and click on the **Report Name**. The **Report Parameters** page for your report will open in a new browser window (Fig. 37). The window will display a series of fields that to filter certain data for your report. These fields will vary from report to report.

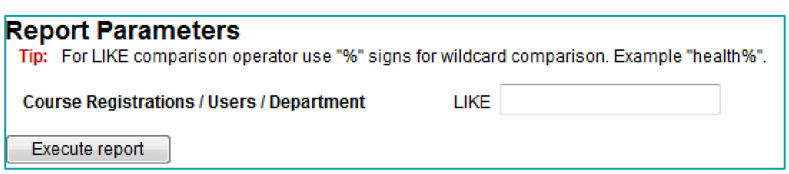


Figure 37

Step 5: Enter the requested Report Parameters into the **LIKE** field (Fig 38). You can enter any group level. For this example we have chosen to enter an Office, CMS or CHD name.

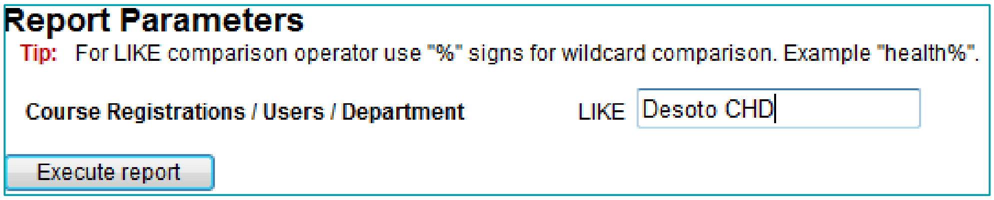


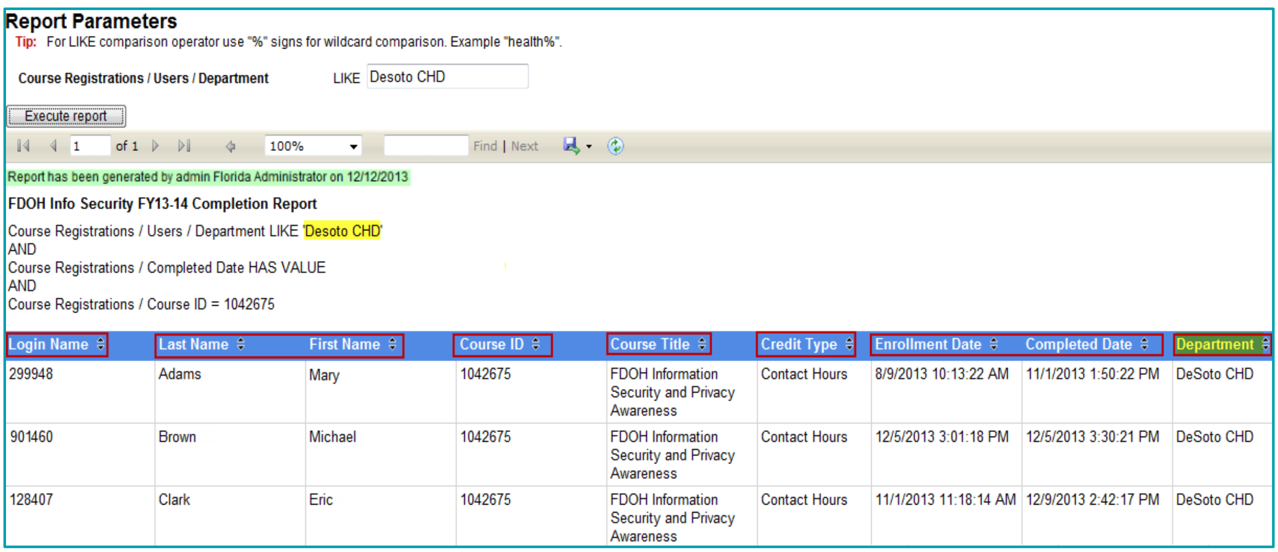
Figure 38

NOTE: The group name must be entered **exactly** as it is listed in TRAIN Florida. Click this link to the [TRAIN Florida Grouping Structure]() Excel spreadsheet to guide you.

To do a LIKE comparison filter use the **%** sign for wildcard. For example – Desoto% By adding the wildcard **%** your report will return learners who may not have the group name listed correctly in their learner profile.

Step 6: Click the **Execute Report** Execute report button to run the report.

Step 7: When the system completes the data collection it will open the report (Fig. 39).
NOTE: The sample report was the FDOH Info Security FY13-14 Completion Report.


Report Parameters
Tip: For LIKE comparison operator use "%" signs for wildcard comparison. Example "health%".
Course Registrations / Users / Department LIKE Desoto CHD
Execute report
1 of 1 100% Find | Next
Report has been generated by admin Florida Administrator on 12/12/2013
FDOH Info Security FY13-14 Completion Report
Course Registrations / Users / Department LIKE 'Desoto CHD'
AND
Course Registrations / Completed Date HAS VALUE
AND
Course Registrations / Course ID = 1042675

Login Name	Last Name	First Name	Course ID	Course Title	Credit Type	Enrollment Date	Completed Date	Department
299948	Adams	Mary	1042675	FDOH Information Security and Privacy Awareness	Contact Hours	8/9/2013 10:13:22 AM	11/1/2013 1:50:22 PM	DeSoto CHD
901460	Brown	Michael	1042675	FDOH Information Security and Privacy Awareness	Contact Hours	12/5/2013 3:01:18 PM	12/5/2013 3:30:21 PM	DeSoto CHD
128407	Clark	Eric	1042675	FDOH Information Security and Privacy Awareness	Contact Hours	11/1/2013 11:18:14 AM	12/9/2013 2:42:17 PM	DeSoto CHD

Figure 39

The **sample report** (Fig. 39) displays:

- Who ran the report and the date
- The learner's Login Name
- The learner's First and Last Name
- The Course ID
- The Course Title
- The Credit Type
- The Enrollment and Completed Date
- The Department Name

Step 8: To download and save your report results – locate and click on the **Save/Export** icon to download the file in the format of your choice (Fig. 40).

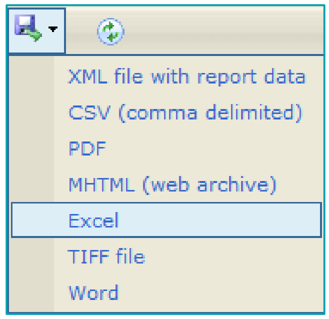


Figure 40

- Click on the **Save/Export** icon – Scroll down the drop down menu and click on the format for your file.
- The **File Download** window will open - Click the **Save** button.
- The **Save As** window will open – Enter the report name in the **File name** field – Then locate and save the file to a folder on your computer by clicking the **Save** button.

Step 9: After you have saved the report - Close the report browser window by clicking on the **X** in the window tab (Fig. 41)

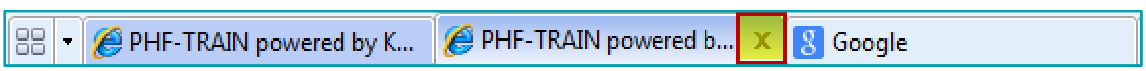


Figure 41

The window will close and you will be returned to the Ad-hoc Reports page.

Section 9 – Special Report Request and Contact Information

If you have reviewed the available TRAIN Florida reporting options and the training data you require is not available or you have a **special report request** you may submit your report request with your specific parameters to the DOH LMS Support team using the . This document can also be found on the TRAIN Florida Administrators Knowledge Center webpage.

If you need assistance or have any questions or please contact the DOH LMS Support Team.

E-mail: DOHLMSSupport@flhealth.gov

Telephone: 850-245-4008