



TMS
2.0

VA

Admin Job Aid

Run Reports



Admin Job Aid: Run Reports

(Revision date: September 11, 2020)

Purpose

The purpose of this job aid is to guide you through the step-by-step process of running a report.

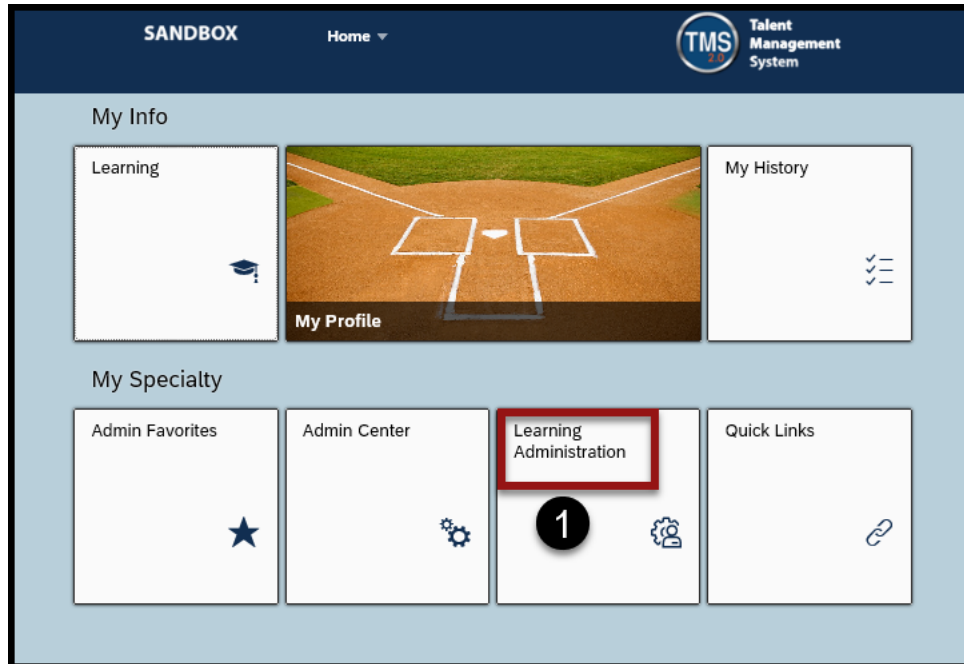
In this job aid, you will learn how to:

- Task A. Search for Reports
- Task B. Run and Schedule a Report
- Task C. Save a Report

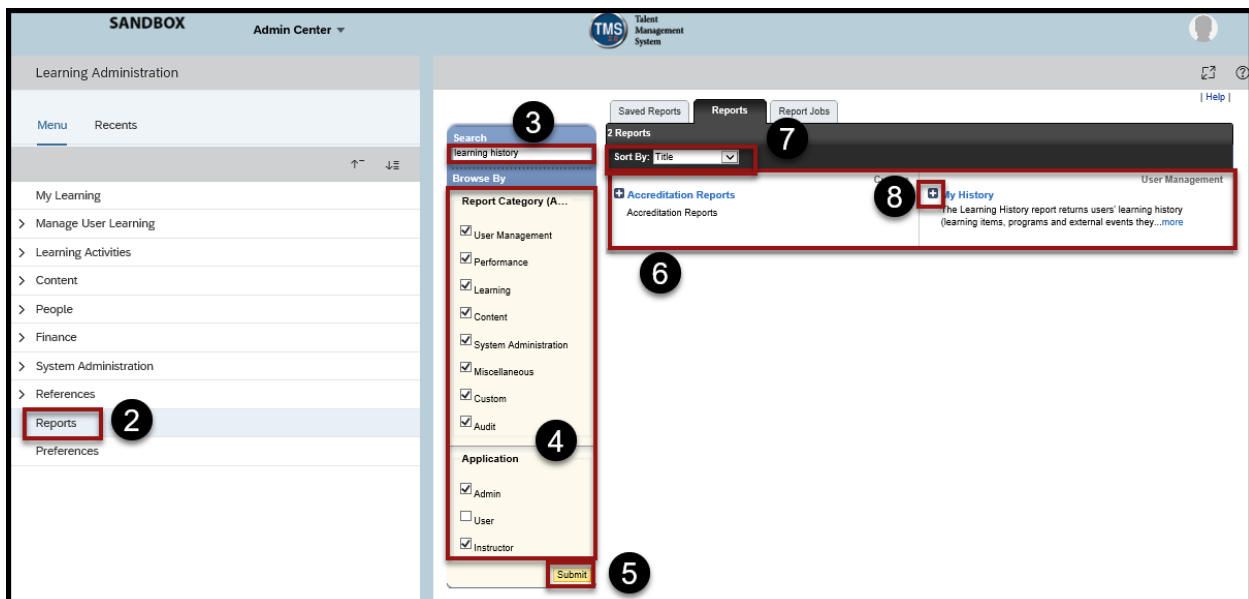


 **Task A. Search for Reports**

1. Select **Learning Administration**.

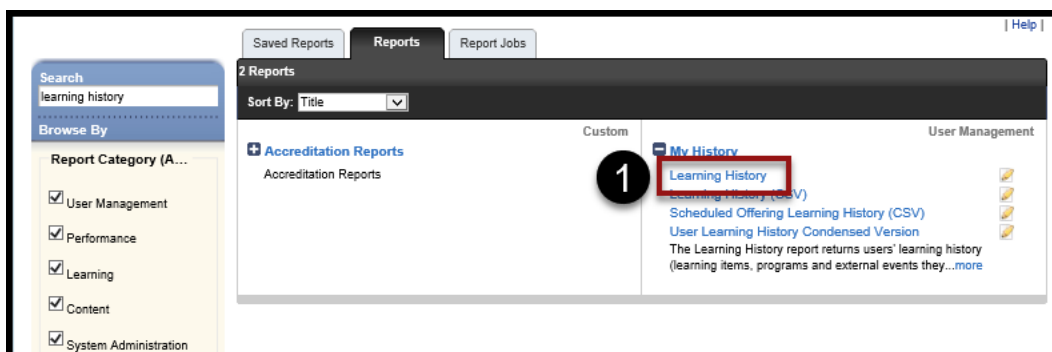


2. Select **Reports**.
3. Enter keywords in the **Search textbox**.
4. Select and deselect checkboxes in the **Browse By** section.
5. Select **Submit**.
6. The **Reports Results** appear on the right-hand side of the page.
7. Use the **Sort By** drop-down list to sort the reports by Title or by Category.
8. Select the **Expand icon** (plus sign) to view a list of available reports in the report group.

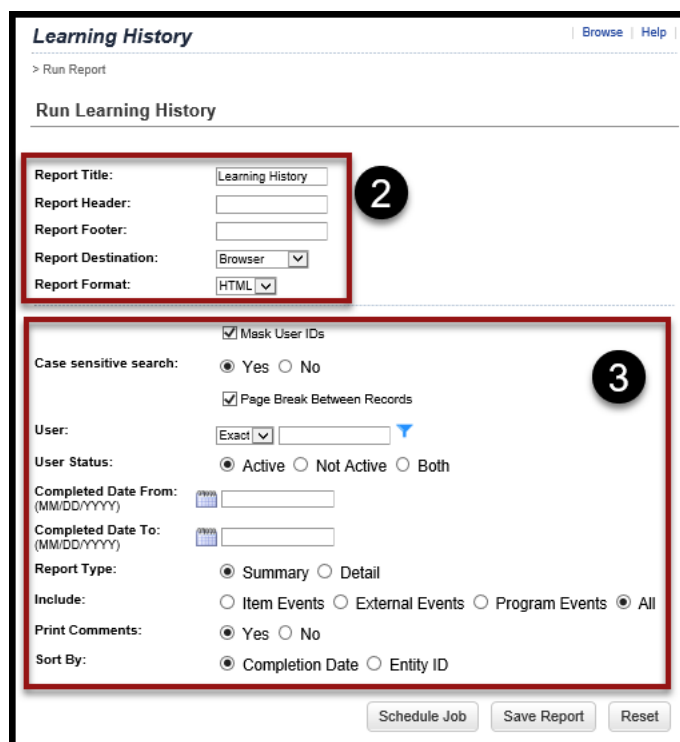


Task B. Run and Schedule a Report

1. **Select the report** you want to run after expanding the list of available reports in the report group.



2. There are two sections of the Run Report screen. The upper part of the page is called the **Formatting** section.
3. The lower part of the Run Report screen is called the **Criteria** section.



The screenshot shows the 'Run Learning History' configuration screen. The title is 'Learning History' with 'Browse' and 'Help' links. Below the title, there is a breadcrumb '> Run Report' and the heading 'Run Learning History'. The screen is divided into two main sections:

- Formatting Section (circled 2):** This section includes fields for 'Report Title' (set to 'Learning History'), 'Report Header', 'Report Footer', 'Report Destination' (set to 'Browser'), and 'Report Format' (set to 'HTML').
- Criteria Section (circled 3):** This section includes various search and filter options:
 - Mask User IDs
 - Case sensitive search: Yes No
 - Page Break Between Records
 - User: Exact [dropdown] [input] [dropdown]
 - User Status: Active Not Active Both
 - Completed Date From: (MM/DD/YYYY) [input]
 - Completed Date To: (MM/DD/YYYY) [input]
 - Report Type: Summary Detail
 - Include: Item Events External Events Program Events All
 - Print Comments: Yes No
 - Sort By: Completion Date Entity ID

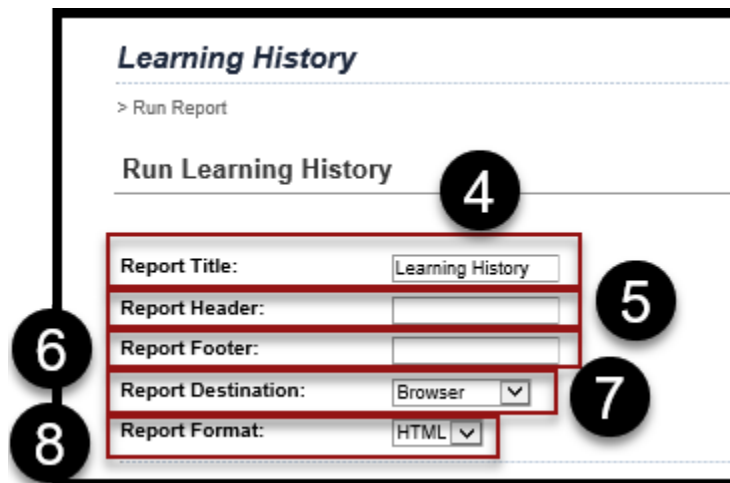
At the bottom of the screen, there are three buttons: 'Schedule Job', 'Save Report', and 'Reset'.

4. (Optional) Modify the **Report Title**.
5. (Optional) Enter a **Report Header**.
6. (Optional) Enter a **Report Footer**.
7. Select a **Report Destination** from the drop-down list.

NOTE: If you select a CSV (Comma Separated Value) Report, then the report destination you must select is Local File.

NOTE: Although there are three options listed (Browser, Local File, Remote File), the VA does not use Remote File. Never select that option.

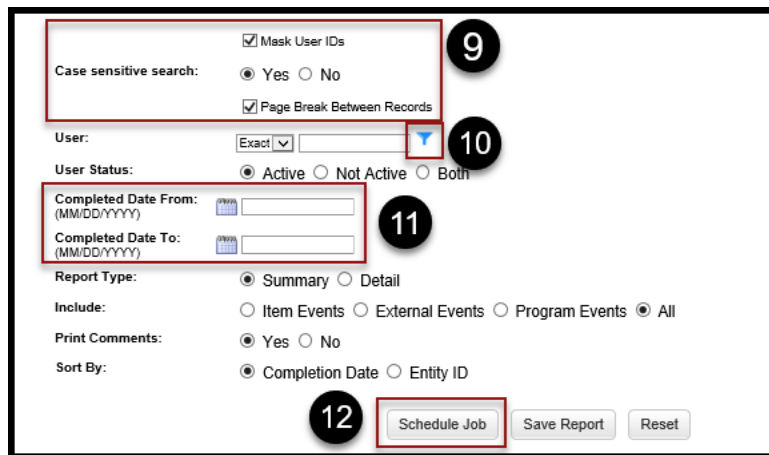
8. Select a **Report Format** from the drop-down list.



The screenshot shows a web form titled "Learning History" with a sub-header "Run Learning History". The form contains five input fields, each with a numbered callout:

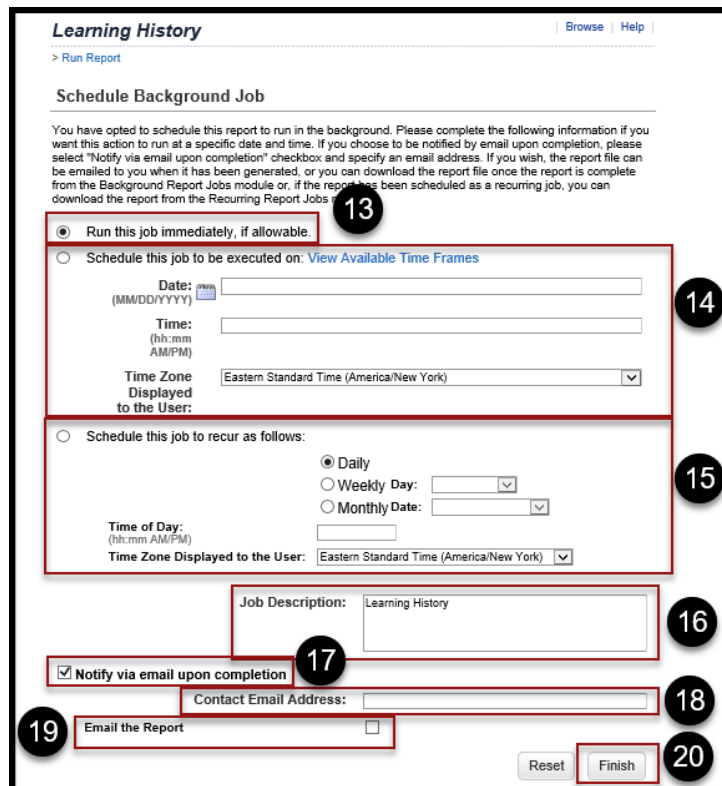
- 4: "Run Learning History" (Section Header)
- 5: "Report Title:" (Text input field containing "Learning History")
- 6: "Report Header:" (Text input field)
- 7: "Report Footer:" (Text input field)
- 7: "Report Destination:" (Dropdown menu showing "Browser")
- 8: "Report Format:" (Dropdown menu showing "HTML")

9. **Mask User IDs, Case Sensitive Search, and Page Break Between Records** are filled out by default, but you can edit those settings as needed.
 10. Select the **Filter Icon** (blue funnel) to search for and select the users you want to run the Learning History report on.
 11. Select the **Calendar Icon** to input the date range from which the Learning History data will be drawn.
- NOTE:** There are additional settings filled out by default. You can change the settings by selecting a different radio button.
12. Select **Schedule Job**.



The screenshot shows a web-based configuration form for a report. It includes several sections with radio buttons and checkboxes. A red box highlights the top section (Mask User IDs, Case sensitive search, Page Break Between Records) with a callout '9'. Another red box highlights the 'User' field and the blue funnel icon with a callout '10'. A third red box highlights the date range fields (Completed Date From and Completed Date To) with a callout '11'. A fourth red box highlights the 'Schedule Job' button with a callout '12'. Other visible options include 'User Status' (Active, Not Active, Both), 'Report Type' (Summary, Detail), 'Include' (Item Events, External Events, Program Events, All), 'Print Comments' (Yes, No), and 'Sort By' (Completion Date, Entity ID). Buttons for 'Save Report' and 'Reset' are also present.

13. There are three different options for scheduling the report. Select **Run this job immediately, if allowable** radio button if the report needs to be run right away.
 14. Select the **Schedule this job to be executed on** radio button to schedule the report to run on a specific date and time. Select the View Available Time Frames link to see a list of times you are allowed to run the report.
- NOTE:** You must enter the future Date, Time, and Time Zone that you want the report to be run.
15. Select the **Schedule this job to recur as follows** radio button to schedule the report to run on a specified, recurring schedule.
- NOTE:** You must select the Daily, Weekly, or Monthly radio button and enter the Time and Time Zone of the recurring schedule.
16. Enter a **Job Description** if necessary.
 17. Select the **Notify via email upon completion** checkbox.
 18. Enter the **Contact Email Address** to be notified that the report has been run.
 19. Select the **Email the Report** checkbox if you want the report to be emailed to you.
 20. Select **Finish**.



Learning History Browse | Help

[> Run Report](#)

Schedule Background Job

You have opted to schedule this report to run in the background. Please complete the following information if you want this action to run at a specific date and time. If you choose to be notified by email upon completion, please select "Notify via email upon completion" checkbox and specify an email address. If you wish, the report file can be emailed to you when it has been generated, or you can download the report file once the report is complete from the Background Report Jobs module or, if the report has been scheduled as a recurring job, you can download the report from the Recurring Report Jobs module.

Run this job immediately, if allowable. 13

Schedule this job to be executed on: [View Available Time Frames](#) 14

Date: (MM/DD/YYYY)

Time: (hh:mm AM/PM)

Time Zone Displayed to the User:

Schedule this job to recur as follows: 15

Daily

Weekly Day:

Monthly Date:

Time of Day: (hh:mm AM/PM)

Time Zone Displayed to the User:

Job Description: 16

Notify via email upon completion 17

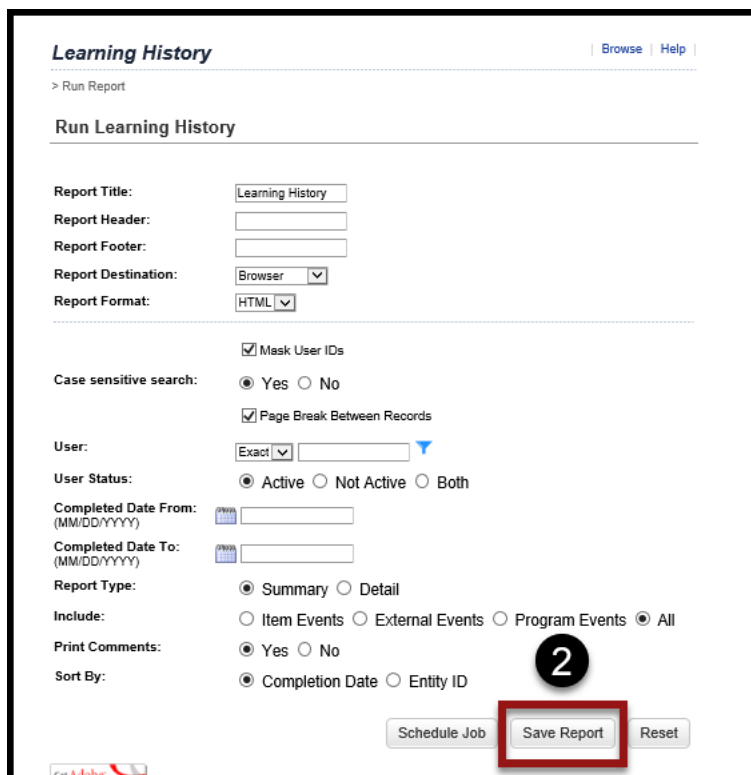
Contact Email Address: 18

Email the Report 19

20

 **Task C. Save a Report**

1. Complete Steps 1-11 in Task B to search for and run a report.
2. Select **Save Report**.



Learning History | [Browse](#) | [Help](#)

> Run Report

Run Learning History

Report Title:

Report Header:

Report Footer:

Report Destination:

Report Format:

Mask User IDs

Case sensitive search: Yes No

Page Break Between Records

User:

User Status: Active Not Active Both

Completed Date From:

Completed Date To:

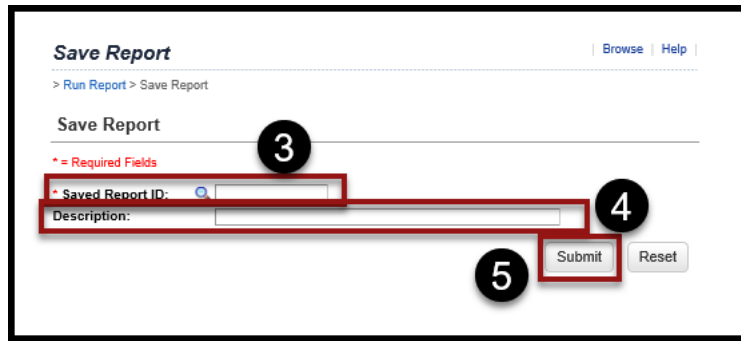
Report Type: Summary Detail

Include: Item Events External Events Program Events All

Print Comments: Yes No

Sort By: Completion Date Entity ID

3. Enter a **Saved Report ID** or select the search icon to search and select a Report ID.
4. (Optional) Enter a **Description** of the saved report.
5. Select **Submit**.



The screenshot shows the 'Save Report' form. At the top, there is a breadcrumb trail: '> Run Report > Save Report'. Below this, the form title is 'Save Report'. A red asterisk indicates required fields. The 'Saved Report ID' field is highlighted with a red box and a callout '3'. The 'Description' field is also highlighted with a red box and a callout '4'. The 'Submit' button is highlighted with a red box and a callout '5'. A 'Reset' button is also visible.

6. The saved report displays in the **Saved Reports** tab.
7. Select the **Launch icon** to be taken to the Run Report screen and complete steps 4-20 from Task B.



The screenshot shows the 'Saved Reports' tab. The 'Saved Reports' tab is highlighted with a red box and a callout '6'. Below the tab, there is a table with the following data:

Report Category	ID	Title	Description	Actions
(none)	(none)	(none)		
User Management	Sample Saved Report	Learning History		

The 'Launch icon' in the 'Actions' column is highlighted with a red box and a callout '7'.