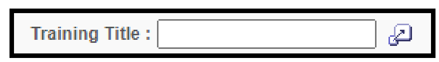
Run Reports on Your Team’s Training

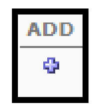
Cornerstone has a variety of reports supervisors can use to display information for their subordinates. Instructions for creating the most commonly used reports are listed below.

Training Progress Pie Chart

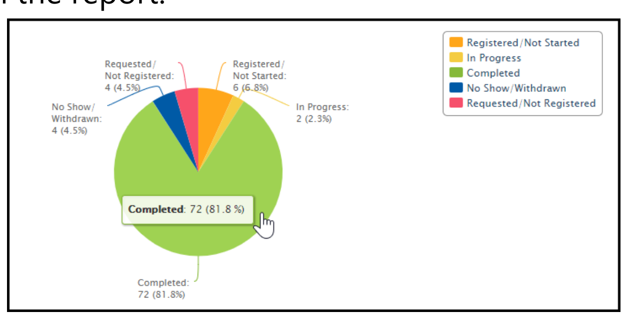
Displays a pie chart summary of your subordinates' training progress.

1. From the **Menu**, select **Reports** > **Standard Reports**.
2. Select the **Track Employees** icon on the Reports page.
3. Select **Training Progress Pie Chart**.
4. Date Criteria section (can be left blank):
   - Use the **Select** dropdown to review and select a pre-defined date range option (e.g. This Month, This Year, Last 30 Days).
   - Or, create a custom date range by entering specific dates in the **From** and **To** fields.
5. In the Training Type section, you may add or remove a checkmark to include or exclude a training type from your report.
6. Training Title field:
   - Leave this field blank to create a report that includes all your subordinates’ training.
   - To create a report for one specific training, select the small **Search** button to the right of the search box. A pop-up window appears. Enter the training title and select **Search**. Select the training from the search results by selecting the **Plus** sign button in front of the training title.





7. Options section:
   - To include all training records, leave the Hide Archived Training checkbox blank (active, completed, archived).
   - If you are a supervisor who supervises other supervisors, you may check the box to Include Indirect Subordinates.
8. In the Display section, select **All Training** or **Assigned Training**.
9. In the Equivalent Training section, you may check the box to include completions for equivalent courses (recommended).
10. In the Include Removed Training section, you may check the box to include training that was removed from subordinates’ transcripts.
11. In the User Status section, you may check the box to include inactive subordinates’ transcripts.
12. Select **Search** at the bottom of the page to run the report.
13. Scroll down the page to view the report results. An interactive Pie Chart appears.



14. Below the Pie Chart is a listing of the report details. You can review the information by using the **Previous** and **Next** navigation links at the top right of the list.
15. Select the **View Details** button to the right to view a specific subordinate's transcript details. Select the **Back** button at the bottom of the page to return to the report results.
16. You can print or export the report by selecting **Printable Version** or **Export to Excel**.

Training Status Summary

Displays the progress status for all training items on each employee transcript. Statuses include not started, in progress, or completed.

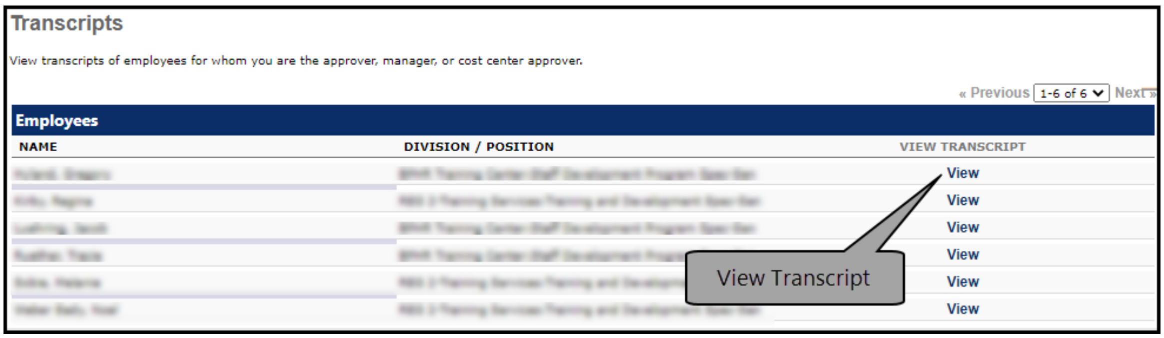
1. From the **Menu**, select **Reports** > **Standard Reports**.
2. Select the **Track Employees** icon on the Reports page.
3. Select **Training Status Summary**.
4. Date Criteria section (can be left blank):
   - Use the **Select** dropdown to review and select a pre-defined date range option (e.g. This Month, This Year, Last 30 Days).
   - Or, create a custom date range by entering specific dates in the **From** and **To** fields.
5. In the Training Type section, you may add or remove a checkmark to include or exclude a training type from your report.
6. Options section:
   - To include all training records, leave the Hide Archived Training checkbox blank (active, completed, archived).
   - If you are a supervisor who supervises other supervisors, you may check the box to Include Indirect Subordinates.
7. In the Display section, select **All Training** or **Assigned Training**.
8. In the Include Removed Training section, you may check the box to include training that was removed from subordinate's transcripts.
9. Select **Search** at the bottom of the page to run the report.
10. Scroll down the page to view the report results. A Bar Chart appears.
11. Below the Bar Chart is a listing of the report details. You can review the information by using the **Previous** and **Next** navigation links at the top right of the list.
12. Select the **View Details** button to view a specific subordinate's transcript details. Select the **Back** button at the bottom of that page to return to your report.
13. You can print or export the report by selecting **Printable Version** or **Export to Excel**.

Use the Transcripts Report for quick access to your subordinates' training transcripts.

Transcripts

Displays transcripts of employees for whom you are the approver, manager, or cost center approver.

1. From the **Menu**, select **Reports** > **Standard Reports**.
2. Select the **Track Employees** icon on the Reports page.
3. Select **Transcripts**.
4. A list of your subordinate staff appears in alphabetical order by last name. To go to a staff member's transcript, select **View** to the right of their name.



Not all fields/filters are required when creating reports. If you need a report with more information, try leaving a few filters blank.

Please take some time to check out all the reports available to supervisors. **Reports** > **Standard Reports** > **Track Employees**.