



## I. Generate the Enterprise Training Report for One Individual's Full Transcript

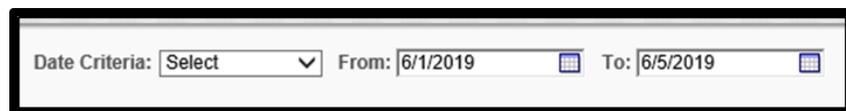
1. Open **Reports** from the menu ribbon, then select **Standard Reports** from the dropdown menu.



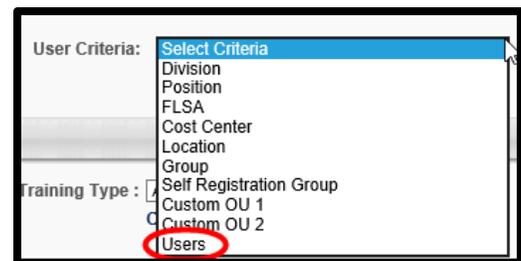
2. Select the **Training icon**  in the Reports window.

3. Scroll down in the Training reports page and select the **Enterprise Training link**.

4. Set your **Date Criteria**.



5. Set the User Criteria.
  - Select **Users** from the User Criteria dropdown menu.



- Use the **Search icon**  to begin the search for the employee you need.

- **Type in the employee's last name** in the Last Name textbox and select the **Search button**. 

- Select the **blue plus sign**  next to the employee's name.

- Select the **Done button**. 

 **To run the Enterprise Transcript Report for a Division, see the changes to Steps 5 and 6 in the next section of this job aid.**



## 6. Set the **Advanced Criteria**.

- Select desired completions statuses in the Status section.
- Select additional criteria for Completion Date, Equivalent Training, Recurring Training, and User Status.

**ADVANCED CRITERIA**  
Training Type : All English (US)  
Check All / Clear All  
Status :  Approved  Denied  In Progress  Past Due  Pending Evaluation  Registration Pending  
 Cancelled  Exception Requested  Incomplete  Pending Acknowledgement  Pending Payment  Waitlisted  
 Completed  Exempt  No Show  Pending Approval  Pending Prerequisite  Withdrawn  
 Completed (Equivalent)  Failed  Not Available  Pending Completion Approval  Registered  
Training Title :   
Provider : All  
Completion Date :  Include column for completion date  
Equivalent Training :  Show training titles of the equivalent training completed by the user if items become completed by equivalency (only when training is selected).  
Recurring Training :  Include all records of this training on a transcript. If unchecked only the most recent registration will be included.  
Removed Training :  Include training that was removed from the transcript by an administrator  
User Status :  Search all inactive users

- Select the **Search button**.



## 7. Export the report to Excel when it has finished running.

- Select **Export to Excel**.



- When the File Download box appears, select the **Open button**.



The report will open in Excel and be ready for printing.



## II. Changes to Steps 5 & 6 to Generate the Enterprise Training Report for a Division for One Training Title

### 5. Set the User Criteria.

- Select **Division** from the User Criteria dropdown menu.

The screenshot shows a dropdown menu labeled "User Criteria:". The menu is open, displaying three options: "Select Criteria", "Division", and "Position". The "Division" option is highlighted in blue.

- Use the **Search icon**  to begin the search for the division you need.
- **Expand each level** of the divisional hierarchy as needed by selecting the **black plus sign in the white square** icon. 
- Select the desired division by selecting the **blue plus sign**  next to the desired division's name.
- Select the **Done button**. 

- When you return to the Enterprise Training Report window, be sure that the **Include Subordinates checkbox** is checked to include the whole division.

The screenshot shows a checkbox labeled "Include Subordinates" with a blue checkmark inside the box.

### 6. Set the Advanced Criteria.

- **Select the desired training statuses** in the Status section.
- **Locate the Training Title** you need with the following steps:
  - Use the **Search icon**  to open the Select Training window.
  - **Type in keywords** associated with the training you desire in the **Search by Title or Keyword: textbox**
  - Select the **Search button** in the Select Training window to generate a list of training objects with that keyword. 
  - Select the **blue plus sign**  to pick the training you'd like to report about.
- Select **desired criteria**: Completion Date, Equivalent Training, Recurring Training, and User Status.
- Select the **Search button**. 



**Continue to Step 7 in Part 1 of this job aid to export the report to Excel.**