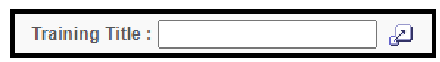
Run reports on your team's training

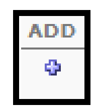
Cornerstone has a variety of reports supervisors can use to display information for their subordinates. Instructions for how to create some of the most commonly used reports are listed below.

Training Progress Pie Chart

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

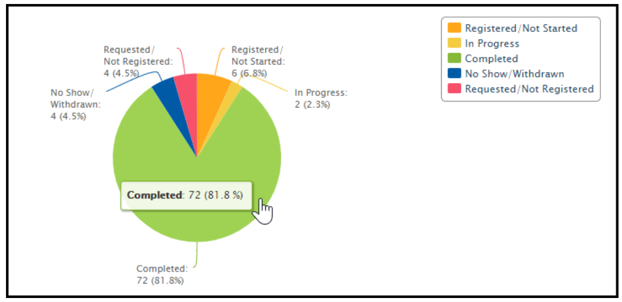
1. From the Home Page, open the **Reports** tab in the menu bar.
2. Select **Standard Reports** from the dropdown menu.
3. Select the **Track Employees** icon on the Reports page.
4. Select **Training Progress Pie Chart**.
5. Date Criteria section:
   - Use the **Select** dropdown to review and select 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.
6. In the Training Type section, select to add or remove a check mark from the types of training you want included or excluded from your report.
7. 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.





8. Options section:
   - To include all training records, leave the Hide Archived Training checkbox blank (active, completed, archived).
   - If you are a supervisor that supervises other supervisors, you may add a check in the checkbox to Include Indirect Subordinates.
9. In the Display section, select **All Training** or **Assigned Training**.
10. In the Equivalent Training section, add a check to the checkbox if you want to include completions for equivalent courses.
11. In the Include Removed Training section, add a check to the checkbox if you want to include training that was removed from subordinates' transcripts.
12. In the User Status section, add a check to the checkbox if you want to include inactive subordinates' transcripts.
13. Select **Search** at the bottom of the page to run the report.

14. Scroll down the page to view the report results. An interactive Pie Chart appears.



15. Below the Pie Chart is a listing of the report details. Review the information by using the **Previous** and **Next** navigation links on the top right of the list.
16. Select the **View Details** button to the right to go to a specific subordinate's transcript details. Return to the report results by selecting the Back button on the bottom of the page.
17. You can print or export the report by selecting the **Print** or **Excel** buttons.

Training Status Summary

Displays a summary of how many training items each employee has that are not started, in progress, or completed.

1. From the Home Page, open the **Reports** tab in the menu bar.
2. Select **Standard Reports** from the dropdown menu.
3. Select the **Track Employees** icon on the Reports page.
4. Select **Training Status Summary**.
5. Date Criteria section:
   - 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.
6. In the Training Type section, select to add or remove a check mark from the types of training you want included or excluded from your report.
7. Options section:
   - To include all training records, leave the Hide Archived Training checkbox blank (active, completed, archived).
   - If you are a supervisor that supervises other supervisors, you may add a check in the checkbox to Include Indirect Subordinates.
8. In the Display section, select **All Training** or **Assigned Training**.
9. In the Include Removed Training section, add a check to the checkbox if you want to include training that was removed from subordinate's transcripts.
10. Select **Search** at the bottom of the page to run the report.

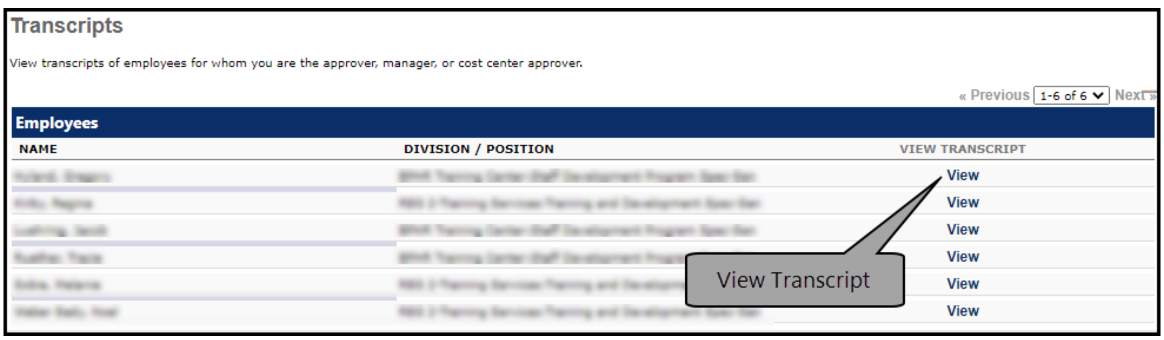
11. Scroll down the page to view the report results. A Bar Chart appears.
12. Below the Bar Chart is a listing of the report details. Review the information by using the **Previous** and **Next** navigation links on the top right of the list.
13. Select the **View Details** button to the right to go to a specific subordinate’s transcript details. To return to your report, select the **Back** button on the bottom of that page.
14. You can print or export the report by selecting the **Print** or **Excel** buttons.

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 Home Page, open the **Reports** tab in the menu bar.
2. Select **Standard Reports** from the dropdown menu.
3. Select the **Track Employees** icon on the Reports page.
4. Select **Transcripts**.
5. 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. Try leaving a few filters blank if you need a report with more information.

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