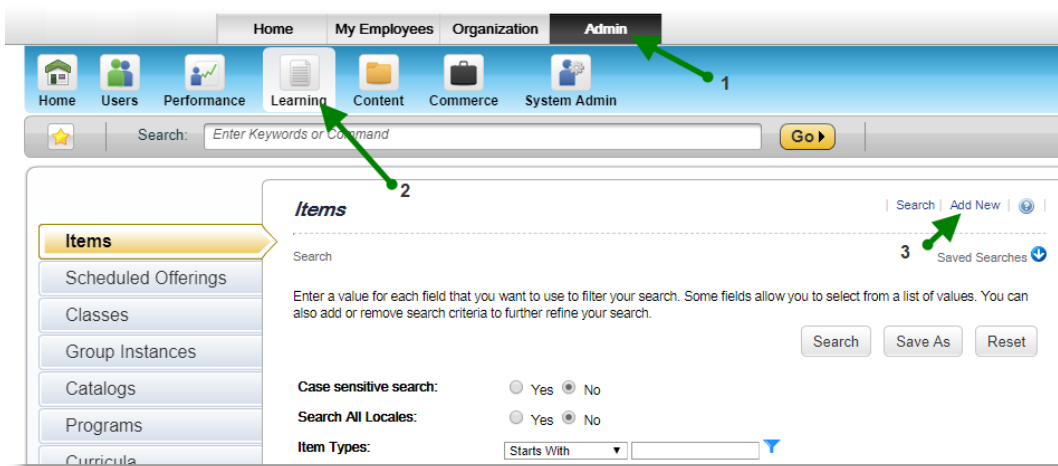




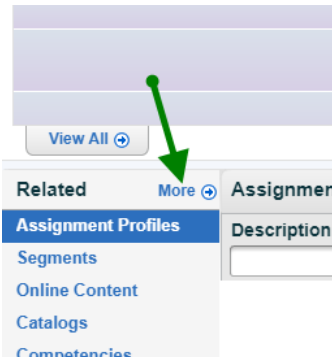
LMS-Pros Compliance Training Reports

Setup (For your reports to function correctly, follow the steps provided)

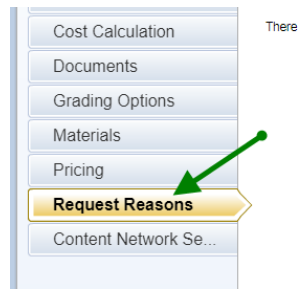
1. Create a new Item **1. Admin > 2. Learning > 3. Add New**



2. Choose "Online Only", click OK
 - a. ID: REPORT_CONFIG
 - b. Title: "Report Configuration *** DO NOT DELETE ***"
 - c. All other fields enter at your discretion
 - d. Click "Save & Exit"
 - e. Click "More"



3. Click "Request Reasons"





LMS-Pros Compliance Training Reports

4. Enter the following information
 - a. For repeated Request Reason ID, increment the trailing number for corresponding ID(s). ex.1-3
 - b. **Caution** – Ensure there are no trailing spaces at the end of each ID and Description
 - c. Note: **Optional** enter null for "..._id_1" if you want to ignore this filter

	Request Reason ID	Description	Instances allowed
Required (Only 1)	TR1	(Enter the User ID of the Top Leader in your organization – Usually your CEO)	1 (Only)
Required (Only 1)	TR2	(Enter the User ID of the any other Top Leader in your organization – Usually your CEO)	1 (Only)
Optional	cmpl_stat_id_1	(Enter the Completion Status ID's that you want included) References>Learning>Completion Status	1-40
Optional	emp_stat_id_1	(Enter the Employee Status ID's that you want included) References>User Management>Employee Status	1-5
Optional	rtyp_id_1	(Enter the Assignment Type ID's that you want included) References>Learning>Assignment Types	1-10
Optional	qual_typ_id_1	(Enter the Qualification Type ID's that you want excluded)	1-5
Required	compl_green	(Enter the minimum value that represents Green) Example: Goal of 95% or greater, enter .949	1 (Only)
Required	compl_red	(Enter the maximum value that represents Red) Example: 90% or less will show Red, enter .9	1 (Only)
Required	pastdue_green	(Enter the minimum value that represents Green for PastDue column) Example: Goal of 5% or less, enter .05	1 (Only)
Required	pastdue_red	(Enter the maximum value that represents Red for PastDue column) Example: 10% or greater will show Red, enter .1	1 (Only)

- d. report is built to go down 10 levels from the Top Leader (if more levels are required contact LMS-Pros)
- e. Yellow is automatically calculated based on the values between Green and Red



LMS-Pros Compliance Training Reports

- Objectives
- Requests
- Government Reporti...
- Chargeback
- Cost Calculation
- Documents
- Grading Options
- Materials
- Pricing
- Request Reasons**
- Content Network Se...

Request Reason ID	Description	Remove
TR1	CEO_USER_ID	<input type="checkbox"/>
cmpl_stat_id_1	BLENDED-COMP	<input type="checkbox"/>
cmpl_stat_id_10	eLEARN-COMP	<input type="checkbox"/>
cmpl_stat_id_11	eLEARN-COMP(APPROVAL)	<input type="checkbox"/>
cmpl_stat_id_12	eLEARN-COMP(ILT)	<input type="checkbox"/>
cmpl_stat_id_2	ILT-COMP	<input type="checkbox"/>
cmpl_stat_id_3	ILT-COMP(RU)	<input type="checkbox"/>
cmpl_stat_id_4	ILT-COMP_NOSIG	<input type="checkbox"/>
cmpl_stat_id_5	OJT-COMP	<input type="checkbox"/>
cmpl_stat_id_6	OJT-COMP(No_Student_eSign)	<input type="checkbox"/>
cmpl_stat_id_7	OJT-COMP(RU)	<input type="checkbox"/>
cmpl_stat_id_8	RU-COMP	<input type="checkbox"/>
cmpl_stat_id_9	SRV_eLEARN_APPROVAL	<input type="checkbox"/>
compl_green	.95	<input type="checkbox"/>
compl_red	.9	<input type="checkbox"/>
emp_stat_id_1	A	<input type="checkbox"/>
pastdue_green	.05	<input type="checkbox"/>
pastdue_red	.95	<input type="checkbox"/>
qual_typ_id_1	null	<input type="checkbox"/>
rtyp_id_1	COMP	<input type="checkbox"/>
rtyp_id_2	LEGAL	<input type="checkbox"/>
rtyp_id_3	REQ	<input type="checkbox"/>

[Select All / Deselect All](#)

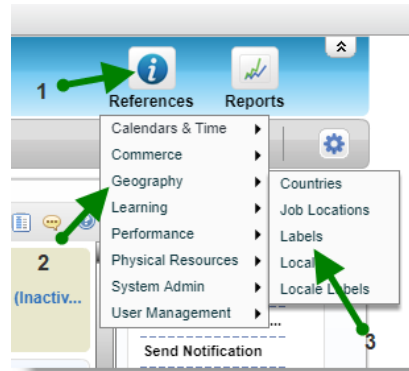
ex.1-3

5. Close Report Configuration window



LMS-Pros Compliance Training Reports

6. Create the following Labels: **1. Preferences > 2. Geography > 3. Labels**



Note: Change the text in the Locals to what best fits your organization

- Steps to create a Label
 1. Click "Add New" for each label indicated in table 2-1
 2. Enter Info from Table 2-1 (Label Type / Label ID / Description)
 - Check "Assign to All Locales" box
 3. Click "Add"
 4. Navigate to "Locales" tab
 5. Enter Labels for each language (add translation as needed)
 6. Click "Apply Changes"
 7. Close Labels window
 8. Repeat for all labels

Label Type	LABEL ID	Description	Use By	Locales > Label Value (edit for your organization)
LABEL	MGR01	MGR01	Admin	CEO
LABEL	TR01	TR01	Admin	{Business Name 1}
LABEL	Business	Business	Admin	Business
LABEL	LVL01	LVL01	Admin	1 Level below CEO
LABEL	LVL02	LVL02	Admin	2 Levels below CEO
LABEL	LVL03	LVL03	Admin	3 Levels below CEO
LABEL	LVL04	LVL04	Admin	4 Levels below CEO
LABEL	LVL05	LVL05	Admin	5 Levels below CEO
LABEL	LVL06	LVL06	Admin	6 Levels below CEO
LABEL	LVL07	LVL07	Admin	7 Levels below CEO
LABEL	LVL08	LVL08	Admin	8 Levels below CEO
LABEL	CC70	CC70	Admin	{Custom Column 70}

Table 2-1

7. Now you're ready to install reports - (Follow steps listed in "SuccessFactors Report Installation Instructions")



LMS-Pros Compliance Training Reports

HOW TO RUN TRAINING COMPLIANCE REPORTS - DASHBOARD

1. Launch your report
2. Complete the required fields
 - a. Fill-in Report Title and Footer (Optional)
 - b. Choose a Format (HTML/PDF)
 - c. Selected a Group By (this is how you can choose to group your results)
 - i. Note: this does not select your users, it only groups your data

Run LMS-Pros Training Compliance Dashboard Report

Report Title:

Report Footer:

Report Destination:

Report Format:

Group By: **Group your results**

User:

* Report Start Date (1st of the month):

(MMM/dd/yyyy)

* Report End Date (1st of the month):

(MMM/dd/yyyy)

* Choose how far out to include Open Training:

(MMM/dd/yyyy)

- d. Select your User population using the User filter. **(Required field)**
 - i. There are many ways to pull in your target group, here is just an example of how you might pull in everyone below your top leader (CEO)
 1. click the filter for User
 2. click the filter for Supervisor
 3. Find your Top Leader
 4. check both "Direct Reports Only" and "Include Indirect Reports"

Organization ID	Direct Reports Only	Include Indirect Reports
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



LMS-Pros Compliance Training Reports

- e. Enter your Report Start Date **(Required field)**
 - i. (use the calendar picker as it will retain the proper format)

Note: The Start date must be in past, normally you will pick the 1st of the previous month.
- f. Enter your Report End Date **(Required field)**
 - i. (use the calendar picker as it will retain the proper format)

Note: The End date **cannot** be in the future, normally the first of your current month
- g. Choose how far out to include Open Training **(Required field)**
 - i. (use the calendar picker as it will retain the proper format)

Note: If you do not want to include open training in your report, choose {todays} date. Normally you will pick the 1st of the month, 3 months after the End date you selected.

Example: If you want to report your training compliance numbers for June 2017, you will enter the following dates

* Report Start Date
(1st of the month): JUN/01/2017
(MMM/dd/yyyy)

* Report End Date
(1st of the month): JUL/01/2017
(MMM/dd/yyyy)

* Choose how far out to include Open Training:
OCT/01/2017
(MMM/dd/yyyy)

- h. Click "Run Report"

The compliance report is looking at all training items completed and due within that given date range (Start - End). It also looks at all training that was overdue on the Report End Date.



LMS-Pros Compliance Training Reports

LMS-Pros Training Compliance Dashboard Report

Report range: 01-Jun-2017 - 01-Jul-2017

Includes Open Training To: 01-Oct-2017

Country	Open On-Time	Overdue	Completed On-Time	Completed Late	Compliance %	Pastdue %	Overdue > 90
AUS	71	6	286	25	92.0%	7.8%	0
DEU	229	7	241	20	94.6%	3.0%	7
SGP	213	2	645	119	87.6%	0.9%	0
USA	3542	39	15032	1161	93.9%	1.1%	10
Entire Company	4055	54	16204	1325	93.6%	1.3%	17

The headers have a rollover that provides the user a better definition of that column

Report range: 01-Jun-2017 - 01-Jul-2017

Includes Open Training To: 01-Oct-2017

Country	Open On-Time	Overdue	Completed On-Time	Completed Late	Compliance %	Pastdue %	Overdue > 90
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DEU	229	7	241	20	94.6%	3.0%	7
SGP	213	2	645	119	87.6%	0.9%	0
USA	3542	39	15032	1161	93.9%	1.1%	10
Entire Company	4055	54	16204	1325	93.6%	1.3%	17

Percentage of training assignments completed on-time in the given period
Indicator of current Training Compliance in the given period

- Green (95% or greater)
- Yellow (between 90% and 95%)
- Red (less than 90%)

The conditional formatting is set during your configuration.

Report range: 01-Jun-2017 - 01-Jul-2017

Includes Open Training To: 01-Oct-2017

Country	Open On-Time	Overdue	Completed On-Time	Completed Late	Compliance %	Pastdue %	Overdue > 90
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Entire Company	4055	54	16204	1325	93.6%	1.3%	17

Percentage of training assignments completed on-time in the given period
Indicator of current Training Compliance in the given period

- Green (95% or greater)
- Yellow (between 90% and 95%)
- Red (less than 90%)

Group By

Color coding and ranges are derived by your configuration settings