

## Reports: Running Course Completions and Reoccurring Reports

*\*\*Need Admin rights to run these reports*

This report is to obtain course completion results on people who have taken courses in HealthStream (HS). These directions are for people who do NOT have access to MyTeam dashboard and will be running this report directly through their Administrator log in.

You may run this as a 1 time report - *OR* – you may program reports to occur at specific times.

**Important Notes:** The data from this report will:

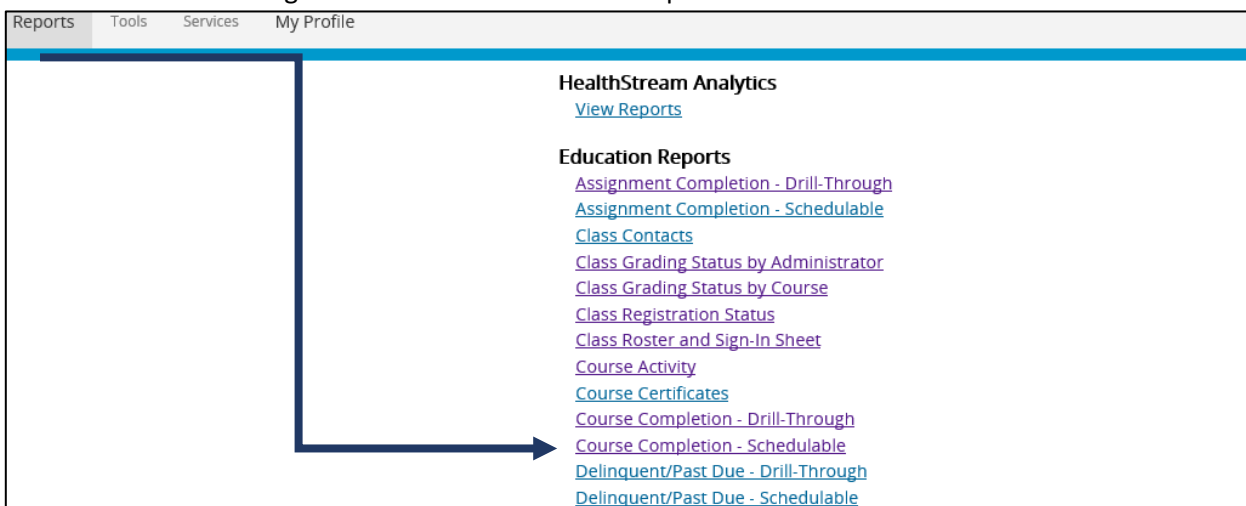
- NOT include completions that have been done **today**. If you need to know if someone has completed a Learning Activity, as of today, you can check an individual’s transcript
- Include completions **ONLY** done in HS, therefore, if you want a listing of all course completions that include both NetLearning and HS you will need to run transcripts on an individual (student) or individuals on a Student Group Transcript

**Important Note:** Running transcripts in HS will contain all of an associate/student’s educational history going back to 2015, including completions done within NetLearning and HS.

**\*\*You must log in as Administrator**

### Part A: Running a Course Completion Report

1. Select **Reports Tab**
2. Select **Course Completion – Schedulable** (screen below will appear) \*Please note your screen may have different listings underneath the Education Reports than the one shown below.



Once you select **Course Completion – Schedulable** the screen below will show up:

On this page you will tailor this report using the following data if applicable:

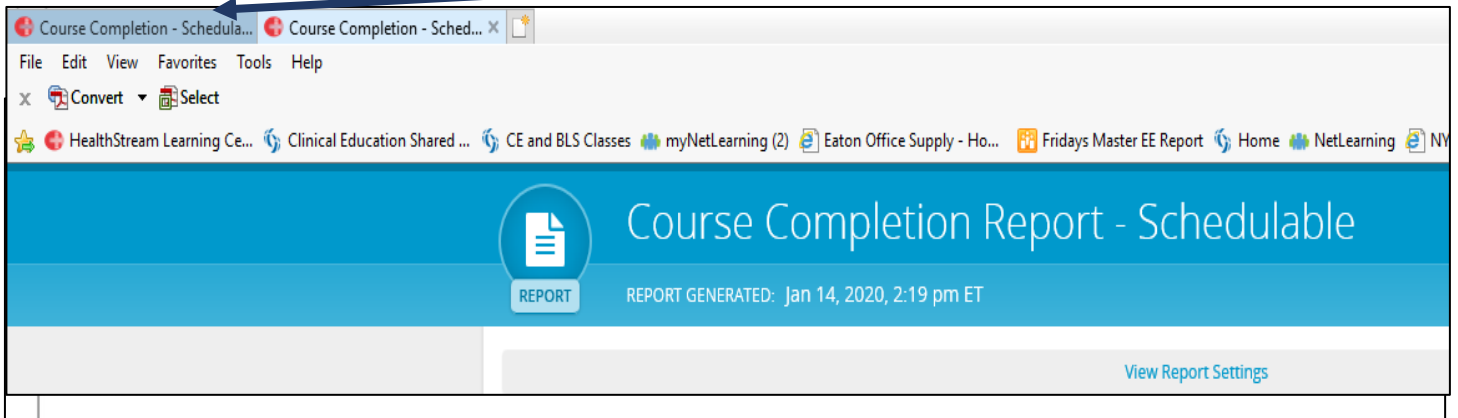
- Learning to Include: default is “All Learning”
- Students to Include: default is “All Selected Students” (this displays BOTH Completions and Incompletes)- recommend
  - You can change to one of the other options to filter the report to either Completions or Incompletes only
- Sort By: default is on “Department, Student, Learning”
- Completion Date Range: select from the drop down, customize the date or keep as the default “Current Year”
- Under Learning- you will want to **Search for Courses** (browse for a course). **When searching for courses this will include Curricula or Equivalents, both live classes, and CBL’s**. Once you search for the course a few options that meet your criteria will appear; check off the one you are looking for then press the **“Select”** button

Once you clicked on the “**Select**” button and the report has been run the Course Completion – Schedulable will come up and the name of the class will appear in the Learning box

- f. Next you will want to ensure the Students box is completed. You can either search for students, select a student group/ or report on all active students
- g. You can include student USER ID in this report whenever possible
- h. Format Options on this page will give you the option of “Include Page Breaks” or “Do Not Include Page Breaks.” Page breaks will allow for you to print/export by department if wanted etc. **Do Not** Include Page Breaks if you want a smaller size (number of pages) in your report
- i. Then select the “**Continue**” button and Completion Report – Schedulable will then come up. You will then export it into an Excel document (as shown below) and format/sort it to fit your needs

## Part B: Reoccurring Reports/Scheduling an Automatic and or Reoccurring Run of a Report

a. After you have run the report you go back to the previous tab



b. The “Schedule this report” option will now come up.

The next section will show the parameters on how you would run your report

**Scheduling**  
**Course Completion - Schedulable - Created Jan. 14 2020 02:21:57 PM**

**a** Request Name: \*  **x**

Email Address:  **b**

Report Format: \*  **c**

Choose whether to run this scheduled task daily, weekly, monthly or quarterly.

Daily

**d** Weekly

Sun  Mon  Tue  Wed  Thu  Fri  Sat

Monthly

1st day of month

Last day of month

Specific day of month

Quarterly

1st day of quarter

Last day of quarter

Specific day of quarter

Note: quarters are defined as calendar quarters.

Schedule Start Date:  **e**  \*

Schedule End Date:   \*

Note: Scheduled tasks are processed nightly between Midnight and 8 AM ET.

- Request Name-here you can change the name of this report to whatever best describes your report
- Email Address-you can add multiple people here to receive this report if needed
- Report Format-HTML, Excel, PDF, etc.
- Select Frequency of this report
- Schedule Start Date and End Date (ensure you are in the correct year)

1-You can manage/edit/delete your report at any time by doing the following:

- Go to your Reports tab
- Then Request Manager
- Then Manage Requests

**Note:**

**Verify the Completion Date Range. If you have selected a static date range, (1/1/2020 – 1/31/20), you will always receive the Scheduled Report containing data from that date range. If you select a dynamic date range, (Current Year), you will receive a report containing current data.**

**Scheduled tasks are processed nightly between Midnight and 8:00am ET. The actual Report may not be received until later in the day. Please keep that in mind when you are setting your parameters of when you want to receive your report.**