

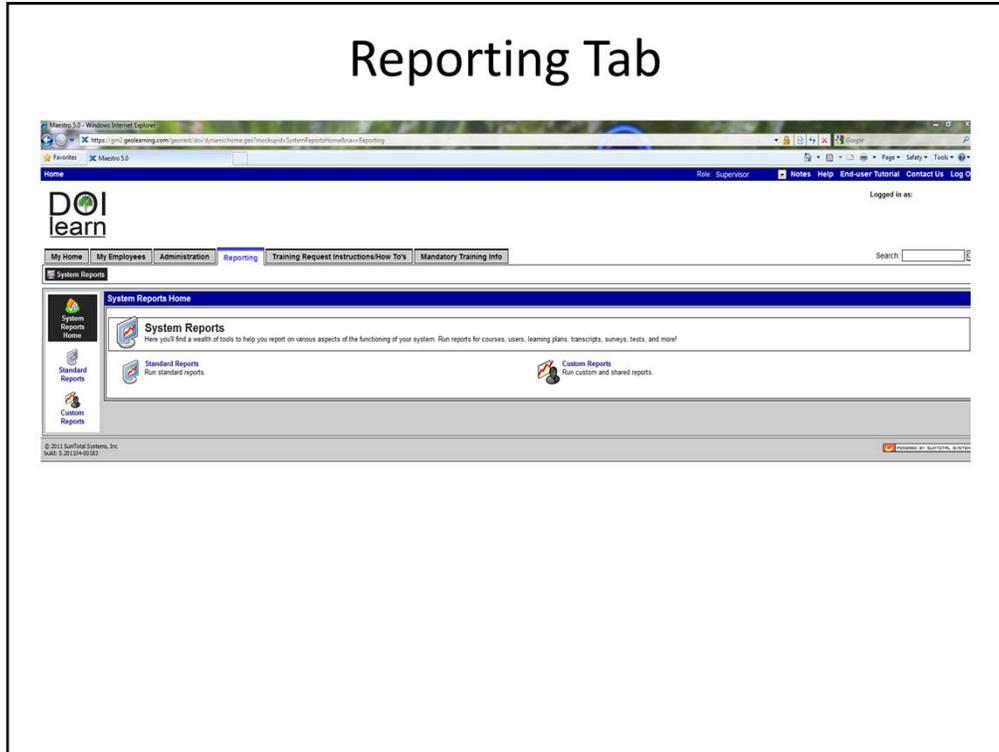
DOI LEARN

How To Run Custom Reports



<http://www.doi.gov/doilearn/index.cfm>

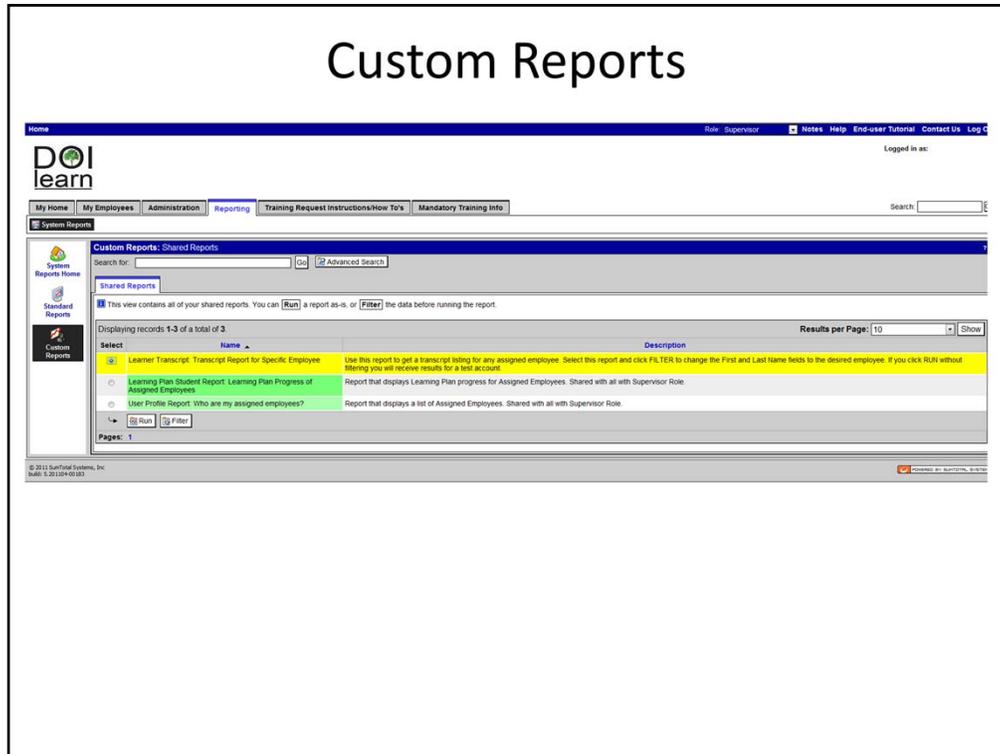
Reporting Tab



When at the initial log in screen make sure you are in as the role of **Supervisor, Instructor, or Program Manager, etc.**

- Select the **Reporting Tab (Instructor Role and Program Manager will also be able to run these reports)**
- Click on **Custom Reports**
- **NOTE:** Program Managers and Instructors can run reports for any employee in the USGS, Supervisors can only run reports for their employees

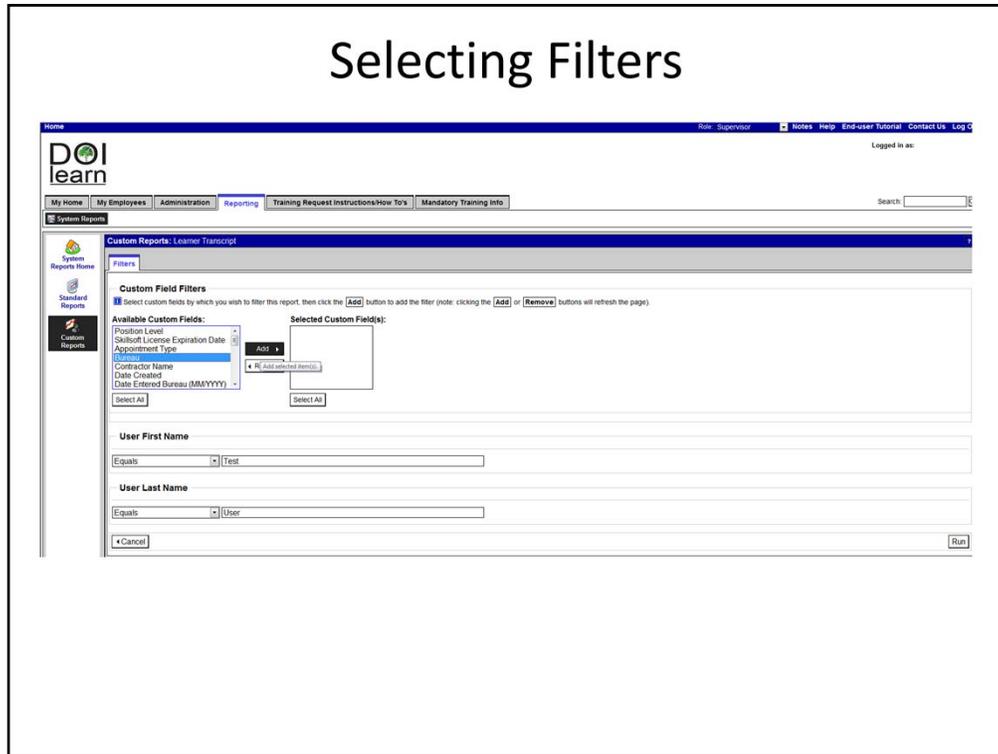
Custom Reports



This is an example of some custom reports offered in DOI LEARN and the selection changes depending on the role you have. Instructors and Program Managers may see different custom reports.

- Select the report you wish to run
- Click the **Filter** button at the bottom of the screen

Selecting Filters



Highlight the Available Custom Fields and select the **Add** button. This will put the different fields into your report.

If there is already a Selected Custom Field in the box and you do not want that field, highlight it and select Remove

Once you add a field you will notice that a Selected Value box will appear at the bottom.

You will need to select the drop down menu and make your selection.

Once you add a field you will notice that a Selected Value box will appear at the bottom.

Running Your Report

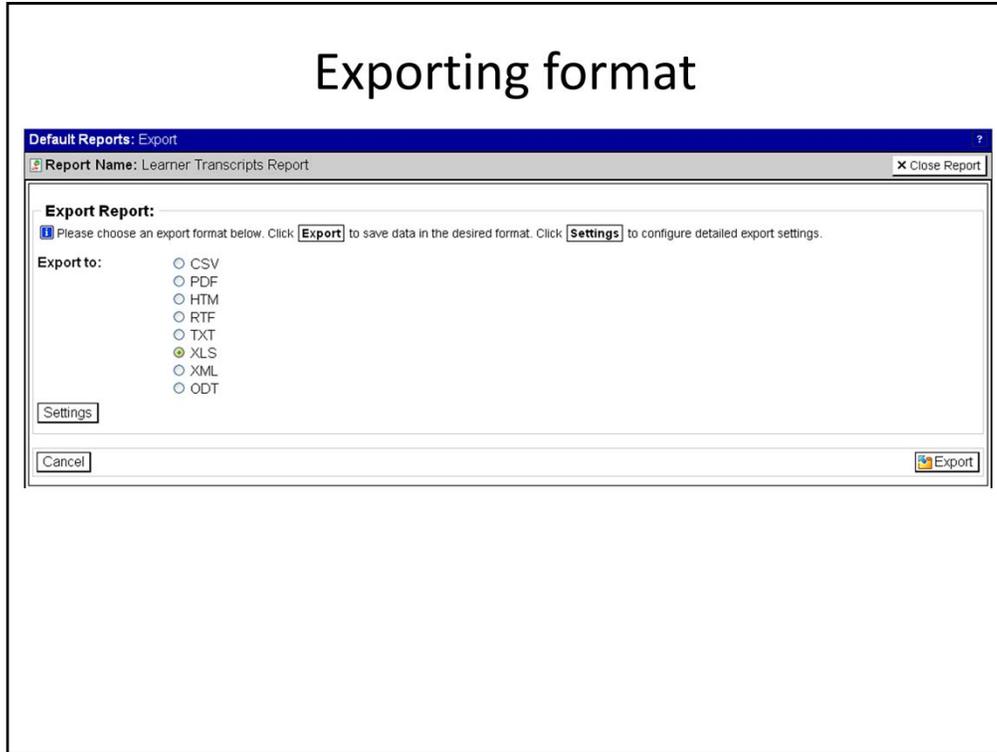
The screenshot displays the 'Running Your Report' interface in the DOI Learn system. The page features a navigation menu with options like 'Home', 'My Employees', 'Administration', 'Reporting', 'Training Request Instructions/How To's', and 'Mandatory Training Info'. A search bar is located on the right. The main content area shows a 'Default Reports - Learning Object Reports: Run Report' section with a 'Report Name: Learner Transcript'. Below this, there is a table with columns: Last Name, First Name, User Email, Course Name, Class Name, Course Completion Status, Registration Status, and Course Type. The table lists 11 records for a user named 'Mary Survey'. The records include courses such as 'NSC Defensive Driving II', 'Colwell's Duty Safety Program', '2010 Federal Information Systems Security Awareness - Privacy and Records Management', and 'Introduction to Water-Quality Sampling'. The table also includes a 'Toggle Size' button and a 'Pages: 1' indicator at the bottom.

Last Name	First Name	User Email	Course Name	Class Name	Course Completion Status	Registration Status	Course Type
Survey	Mary	mhs000@isp.gov	NSC Defensive Driving II	NSC Defensive Driving II	Completed	Enrolled	Online Course
Survey	Mary	mhs000@isp.gov	Colwell's Duty Safety Program	Introduction to	Completed	Enrolled	Enriched Training Course
Survey	Mary	mhs000@isp.gov	2010 Federal Information Systems Security Awareness - Privacy and Records Management	USDS 2011 43501-Phoenix, AZ @ 09a 071-Not Attempted	Completed	Dropped	Instructor Course
Survey	Mary	mhs000@isp.gov	2010 Federal Information Systems Security Awareness - Privacy and Records Management	USDS 2011 43501-Phoenix, AZ @ 09a 071-Not Attempted	Completed	Dropped	Instructor Course
Survey	Mary	mhs000@isp.gov	2010 Federal Information Systems Security Awareness - Privacy and Records Management	USDS 2011 43501-Phoenix, AZ @ 09a 071-Not Attempted	Completed	Dropped	Instructor Course
Survey	Mary	mhs000@isp.gov	2010 Federal Information Systems Security Awareness - Privacy and Records Management	USDS 2011 43501-Phoenix, AZ @ 09a 071-Not Attempted	Completed	Dropped	Instructor Course
Survey	Mary	mhs000@isp.gov	2010 Federal Information Systems Security Awareness - Privacy and Records Management	USDS 2011 43501-Phoenix, AZ @ 09a 071-Not Attempted	Completed	Dropped	Instructor Course
Survey	Mary	mhs000@isp.gov	2010 Federal Information Systems Security Awareness - Privacy and Records Management	USDS 2011 43501-Phoenix, AZ @ 09a 071-Not Attempted	Completed	Dropped	Instructor Course
Survey	Mary	mhs000@isp.gov	2010 Federal Information Systems Security Awareness - Privacy and Records Management	USDS 2011 43501-Phoenix, AZ @ 09a 071-Not Attempted	Completed	Dropped	Instructor Course
Survey	Mary	mhs000@isp.gov	2010 Federal Information Systems Security Awareness - Privacy and Records Management	USDS 2011 43501-Phoenix, AZ @ 09a 071-Not Attempted	Completed	Dropped	Instructor Course
Survey	Mary	mhs000@isp.gov	2010 Federal Information Systems Security Awareness - Privacy and Records Management	USDS 2011 43501-Phoenix, AZ @ 09a 071-Not Attempted	Completed	Dropped	Instructor Course

After clicking **Run** you will be able to view the report on the screen.

- If the report comes up empty you will need to change your filters. To do this make sure you click on the **Close Report** tab and you will be taken back to the report filter section
- If you come up with too many records you can also change your filters too
- If you are satisfied with your report you can export it by clicking the **Export** button
- You can also print the report by clicking on **Print** but we recommend you export first to Excel

Exporting format



- When you select the **Export** button you will have several different file formats. For this report we are exporting using the XLS format.
- When you select the desired format click on the **Export** button. A window will open asking you to Open or Save. It is recommend you click "Open"
- The Excel (XLS) format looks better than the PDF format in this version.

NOTE: When saving the report, make sure to change the file type to an Excel spreadsheet otherwise it saves it as a web page and you **cannot** open it.

Exported Report

	A	B	C	D	E	F	G	H	I
1	Last Name	First Name	User Email	Course Name	Class Name	Course Completion Status	Registration Status	Course Type	
2	Survey	Mary	mkhood@usgs.gov	NSC Defensive Driving II	NSC Defensive Driving II	Completed	Enrolled	Online Course	
3	Survey	Mary	mkhood@usgs.gov	Introduction to Collateral Duty Safety Program Coordinator Training	Introduction to	Completed	Enrolled	External Training Course	
4	Survey	Mary	mkhood@usgs.gov	USGS Leadership Intensive	USGS-2011-0301-Phoenix, AZ (8:00a MT)	Not Attempted	Dropped	Instructor Course	
5	Survey	Mary	mkhood@usgs.gov	Crucial Conversations (USGS)			Registered	Instructor Course	
6	Survey	Mary	mkhood@usgs.gov	2010 Federal Information Systems Security Awareness + Privacy and Records Management	2010 Federal Information Systems Security Awareness + Privacy and Records Management	Waived	Waived	Online Course	
7	Survey	Mary	mkhood@usgs.gov	Safety: Executive Orientation to Safety and Occupational Health	Safety: Executive Orientation to Safety and Occupational Health	In Progress	Dropped	Online Course	
8	Survey	Mary	mkhood@usgs.gov	Safety: USGS Safety Program Requirements for Administrative Personnel	Safety: USGS Safety Program Requirements for Administrative Personnel	In Progress	Dropped	Online Course	
9	Survey	Mary	mkhood@usgs.gov	Firearms-Basic Defense Against Wild Animals	USGS-2011-0408-Morgan Hill, CA (8:30am PT)	Not Attempted	Dropped	Instructor Course	
10	Survey	Mary	mkhood@usgs.gov	Safety: USGS Safety Program Requirements for Administrative Personnel	Safety: USGS Safety Program Requirements for Administrative Personnel	Not Attempted	Dropped	Online Course	
11	Survey	Mary	mkhood@usgs.gov	Computer Security Incident Response Training (CSIRT) 2-Hour			Registered	Online Course	
12	Survey	Mary	mkhood@usgs.gov	Introduction to Water-Quality Sampling	Introduction to Water-Quality Sampling	Completed	Enrolled	Online Course	
13									
14									
15									
16									

This is an example of a report exported into excel so you can change sorting.

NOTE: When saving the report, make sure to change the file type to an Excel spreadsheet otherwise it saves it as a web page and you cannot open it.

Thank You

- Thank you for taking the time to learn about the new DOI Learn system. If you have any more questions you can visit our website at: http://www.usgs.gov/humancapital/ecd/ecd_trainingdoi.html
 - There you will find:
 - FAQ's
 - Several other power point slide shows for Help
 - Internet Settings and Java Version Configurations
 - Clarifications on roles and much more
- Attend a 1 hr. webinar on using the "Report" feature in DOI LEARN. This training is for Supervisors, Program Managers, Instructors, Roster Managers, LP Roster Managers, etc. You just need to email Catherine Book (cbook@blm.gov) and let her know you are interested in attending and she will email you the information for the next Report monthly webinar and she'll provide dial-in information
- Watch for announcements in the Lotus BBS

- http://www.usgs.gov/humancapital/ecd/ecd_trainingdoi.html