

Edvance360 QUICKSTART GUIDE

Offline Reporting

What is Offline Reporting?

The primary use of the Edvance360 Offline Reporting Panel was designed to allow Users the opportunity to create On-Demand Reports based on customized filters and fields. These filters are divided into the following – **User Filters, Training Filters, and Content Filters**. This tutorial will guide you through how to set up each of the filter areas within Edvance360 so your reports are both accurate and efficient.

Home

ACCOUNT >
DASHBOARD >
REPORTS >
OFFLINE REPORTINGS
EMAIL LOGS
FACULTY LOGIN
STUDENT LOGIN
LOGIN LOGS
COURSE REPORTS
COURSE RATINGS
COURSE ENROLLMENT
LITE WIZARD
CONTENT CLONING
NOTIFICATIONS >
CERTIFICATES
EPORTFOLIO >
NETWORK
LINKS >
SEARCH
SUFFIXES

Home » Offline Reportings » Settings

Offline Reports Add New Settings Off Hours E-Mail Supervisor Report

Import

Order By: Date | Approval Export Offline Report

User Filters

These Settings may be adjusted per user in the user manager

Status Exempt Non-Exempt Contractor

Active Active Inactive

User

All

Job Titles 1 selected Sites 1 selected

Cost Centers 1 selected Supervisors 1 selected

Hire Date Start Hire Date End

Training Filters

These settings may be adjusted per course in course settings > offline reporting

Format 1 selected Facilitators 1 selected

Source 1 selected Type 1 selected

Content Filters

Include Content Offline Trainings Lessons

Content Status Completed Incomplete

Trainings

Select Course

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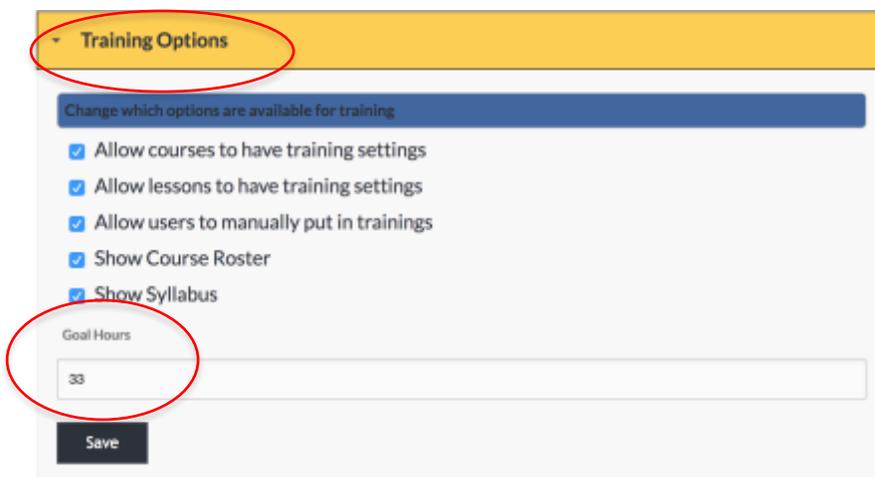
As a secondary function within Offline Reporting, Users may also be given the permission to submit any “Offline” Training to their personal record, with approval from a Supervisor and/or Admin. See Step 7 for more details on how to Add New Offline Trainings.

1 How to Enable Offline Reporting

Navigate to: ADMIN > CONF. & SETTINGS > GENERAL SETTINGS > TRAINING OPTIONS

Be sure to select all empty check boxes to the left of each option that appears on the dropdown box, in order for the appropriate fields to appear within Courses/Lessons for reporting and tracking purposes.

If a specified “Training Goal” is a mandatory requirement for a Client, Admins may key in a total of goal hours that users can track their progress toward before selecting the Save option.



The screenshot shows the 'Training Options' configuration page. The title 'Training Options' is circled in red. Below the title, there is a blue header that says 'Change which options are available for training'. Underneath, there are five checkboxes, all of which are checked: 'Allow courses to have training settings', 'Allow lessons to have training settings', 'Allow users to manually put in trainings', 'Show Course Roster', and 'Show Syllabus'. Below these checkboxes is a 'Goal Hours' field with the value '33' entered, also circled in red. At the bottom of the form is a 'Save' button.

2 Creating User Setting Filters

Navigate to: ADMIN > USER MANAGEMENT > USER TRAINING SETTINGS

User Training Settings can be designated as Job Titles, Cost Centers, or Sites. To begin creating a new User Setting, Admin users can select the setting of their choice next to the “ADD” Option to begin.

Note: The selected User Setting will appear in the display below. There is no limit to the total number of Types, which can be created per User Setting.

User Training Settings

Add: Job Title | Cost Center | Site

Display:
Job Titles

Type	Name	
Job Title	ADMINISTRATIVE SERVICES MANAGE	
Job Title	ADMINISTRATIVE SERVICES MANAGER	
Job Title	Administrative Track	
Job Title	ASPECT ADMINISTRATOR	
Job Title	ASSET ANALYST	
Job Title	ASSET MANAGER	
Job Title	AVP - CASH SERVICES	
Job Title	AVP - FORECLOSURE AND BANKRUPTCY	
Job Title	AVP - LOAN TRANSFER	
Job Title	AVP - REO	

« Previous **1** 2 3 4 5 6 7 8 9 10 Next »

3 Assigning or Mapping Learning Paths to User Settings

If any User Setting created has a course and/or group of Courses which must be completed based on their “role, site, etc”, then a Learning Path can be assigned to that setting by navigating to ADMIN> USER MANAGEMENT> USER TRAINING SETTINGS > Select the “EDIT” option (pencil icon) to the right side of any User Setting. See Screenshot below.

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Admin » User Training Settings » Add

Add Job Title

* Name

New User Title

status

Active

Map Learning Path

Users with this Job Title will automatically be enrolled in selected learning paths.

16617

- Fall 2016 ()
- GIS system ()
- Test Intro to computer science ()

16617-2

- course tech306 ()
- Fall 201619 ()

2017

- (ATD 035) Week 1 - Financial Management (ATD 035-FM)

Note: If Users with existing User Settings have already been added to Courses, and an Admin is editing an Active setting or adding more courses to the previously created Learning Path, they will have the opportunity to return to the User Training Management screen upon submitting saved changes, and allow an “Enroll Current Users” to courses option for the updates.

Administration

- CONFIG & SETTINGS
- USER MANAGEMENT
 - USERS
 - USER ROLES
 - USER ACCESS
 - USER TRAINING SETTINGS**
 - DEPARTMENTS
 - USER DEFINED FIELDS
 - MULTIPLE PARENTS TO STUDENT

Admin » User Training Settings

User Training Settings

Add: Job Title | Cost Center | Site

Display: Job Titles

Type	Name	
Job Title	ADMINISTRATIVE SERVICES MANAGE	
Job Title	ADMINISTRATIVE SERVICES MANAGER	
Job Title	Administrative Track	

Enroll Current Users

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Other User Settings including Supervisors and Hire Dates can be found in the Edit User screen.

Navigate to ADMIN> User Management> Users> Select a User> Select Edit (pencil icon), and then update the fields that apply to that user.

Note: Each User Setting (from above) can be assigned and updated from this same area. Any Supervisors selected from this edit area will be able to login to the Offline Reports panel and view and generate data for their direct reports.

The screenshot shows the 'Administration' interface with a sidebar menu on the left and a main content area. The sidebar menu includes 'CONFIG & SETTINGS', 'USER MANAGEMENT', 'USERS', 'USER ROLES', 'USER ACCESS', 'COURSE TRAINING SERVICES', and 'DEPARTMENTS'. The main content area is titled 'Account Information' and contains several form fields: 'User Role' (dropdown menu with 'Learner' selected), 'Supervisor' (dropdown menu with 'Select Supervisor' selected), a password field (masked with asterisks), 'Job Title' (dropdown menu with 'Select Job Title' selected), 'Cost Center' (dropdown menu with 'Select Cost Center' selected), 'Hire Date' (text input field), and 'Site' (dropdown menu with 'Select Site' selected). Red arrows point to the 'Supervisor', 'Job Title', 'Cost Center', 'Hire Date', and 'Site' fields.

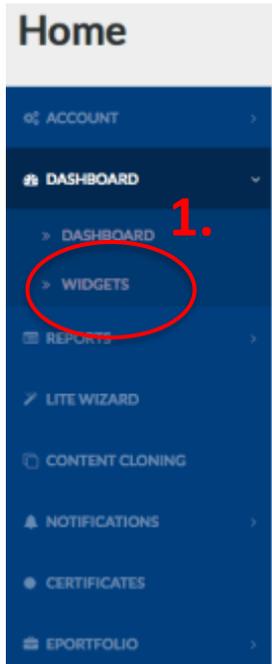
4 Activating HomePage Widgets

Navigate to: HOME> DASHBOARD > WIDGETS

In order to create a shortcut for Learners to access their courses at login, they can select the homepage tool panel tab called DASHBOARDS>Widgets> and turn ON the My Courses tab and then save.

Once users return to their HomePage Dashboard, all courses that they are responsible to complete will appear on their homepage dashboards as a shortcut when they scroll down.

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A screenshot of the 'My Widgets' settings page. It features a table with columns for Status, Widget Name, and Description. The 'Offline Reporting Data' widget has its status set to 'On' (circled in red with a '2.' next to it). A 'Save Widget Settings' button is at the bottom.

Status	Widget Name	Description
<input type="radio"/> On <input checked="" type="radio"/> Off	rssreader	Add RSS feeds to personalize your homepage page.
<input type="radio"/> On <input checked="" type="radio"/> Off	Basic Calculator	Adds a popup calculator to all course pages.
<input type="radio"/> On <input checked="" type="radio"/> Off	Discussion Summaries	Displays unread course and group discussion threads upon login.
<input checked="" type="radio"/> On <input type="radio"/> Off	Number of Students and Courses	Display number of active students, number of active courses and number of enrollments(students in course).
<input checked="" type="radio"/> On <input type="radio"/> Off	Logins	Display login by day.
<input checked="" type="radio"/> On <input type="radio"/> Off	Certificates	Display number of certificates issues per week.
<input type="radio"/> On <input checked="" type="radio"/> Off	Offline Reporting Data	Display offline report items, complete and incomplete courses/lessons that would appear in the report.
<input checked="" type="radio"/> On <input type="radio"/> Off	Early Warning Systems	Displays number of Registered students not logging in from one week, Number of Students with Running Average less than Passing Threshold, Number of Students with 2 assignments passed due.
<input checked="" type="radio"/> On <input type="radio"/> Off	Tools Usage	Display percentage of users that have used following tools * Mailbox * Gradebook * Dropbox * Discussion * Repository * Wiki * Lessons.
<input type="radio"/> On <input checked="" type="radio"/> Off	List of active courses	Displays list of active courses along with start, end dates and course length.
<input checked="" type="radio"/> On <input type="radio"/> Off	Course Progress	Displays gauge for total lesson progress of the course.
<input checked="" type="radio"/> On <input type="radio"/> Off	Test Score	Displays test score as percentage against dates test taken.
<input type="radio"/> On <input checked="" type="radio"/> Off	Comments Per Week	Displays number of comments per week for active courses.
<input checked="" type="radio"/> On <input type="radio"/> Off	Average of Running Averages	Display average of the running average of each student in the course that is still active.
<input checked="" type="radio"/> On <input type="radio"/> Off	My Courses	Display first five enrolled courses.
<input checked="" type="radio"/> On <input type="radio"/> Off	Calendar This Week	Display events of the current week.

3.

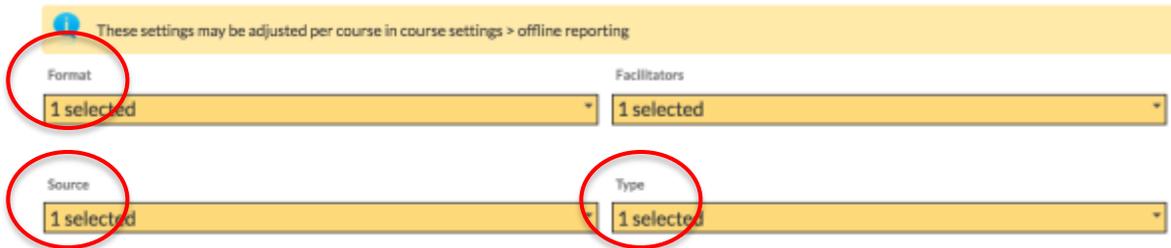
A screenshot of the 'My Courses' page. The header 'My Courses' is circled in red with a '3.' next to it. Below the header is a table with columns for Semester, Name, and Progress.

Semester	Name	Progress
Ashley's Term	Learning to Balance Life	50% Complete
Ashley's Term	E360 Live!	0% Complete
Ashley's Term	Defining an LMS	0% Complete

5 Creating Training Filters

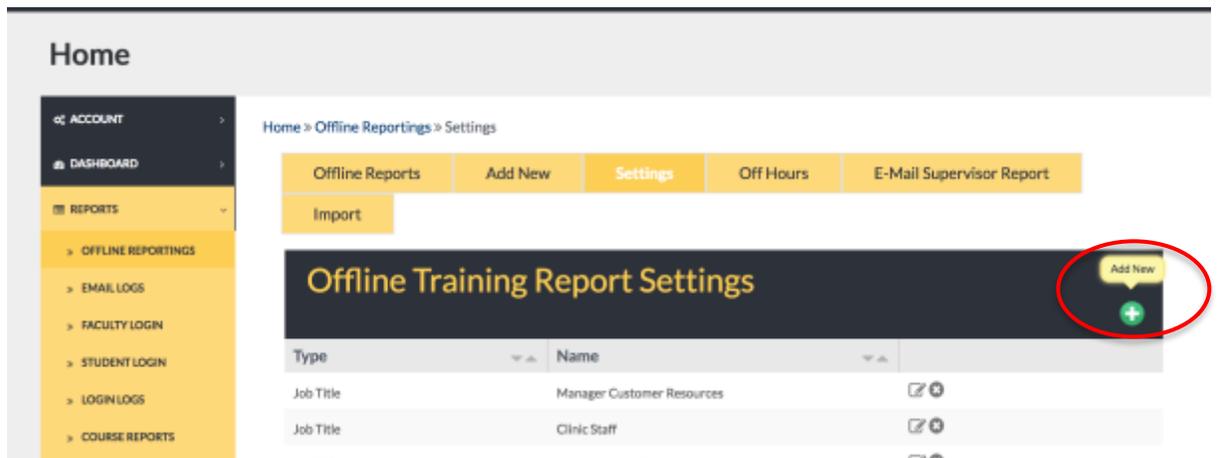
Training filters within Offline Reporting refer to the training details of Courses such as Source, Format, and Type.

Training Filters

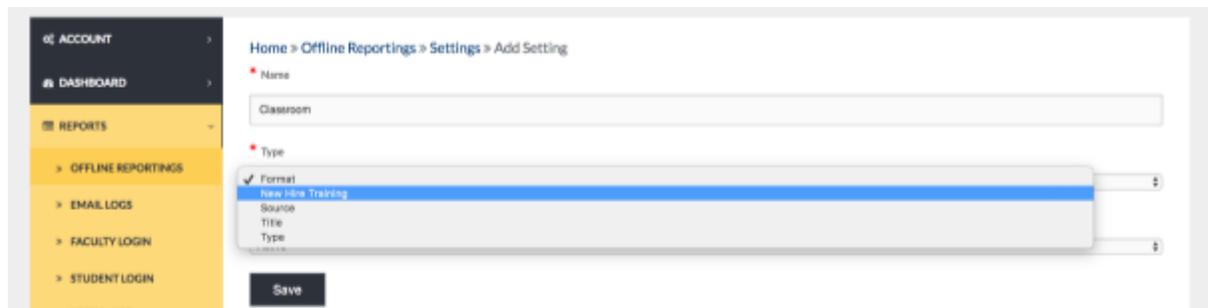


Navigate to: HOME > Offline Reporting > Settings > Add New to generate selections for these settings in the filter dropdowns.

When the Add New screen opens, Admin users can key in the title of their User Setting, then select



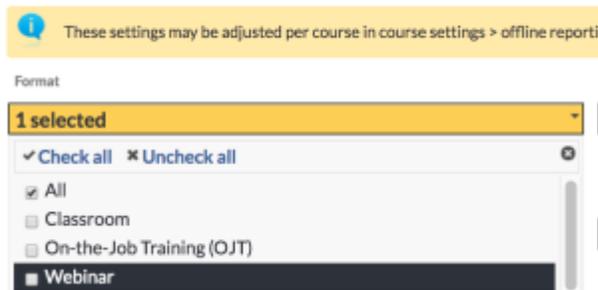
the corresponding setting from the dropdown and select save.



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All added settings will then be viewable from the dropdown filters on the Offline Reporting homepage.

Training Filters

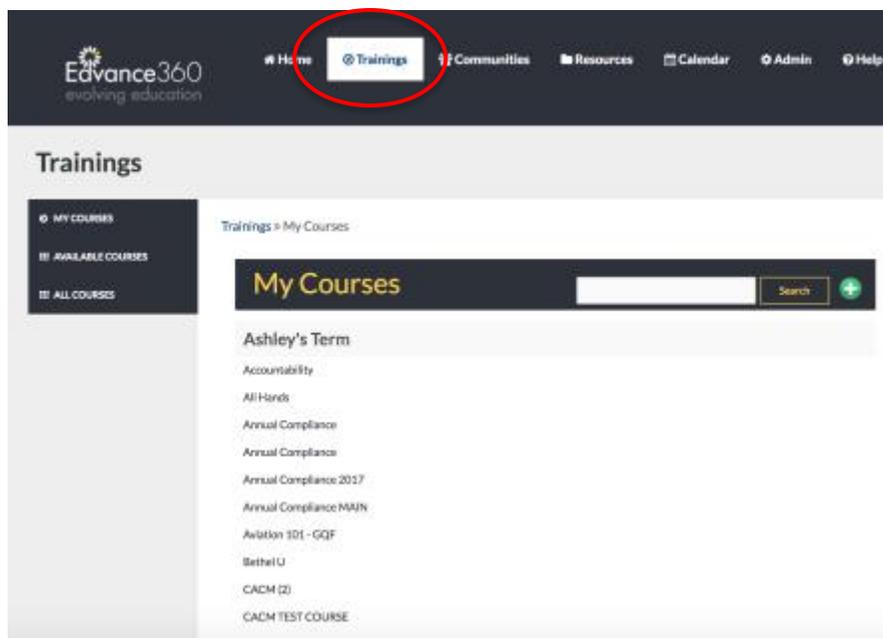


6 Mapping Courses and Lessons to Training Filter Settings

Once the preferred Training Settings have been created as Sources, Formats, Types, New Hire, etc. in the Offline Reporting tool, Admin Users will have the opportunity to map or link their Courses and their Lessons in those courses to these settings to generate accurate on demand reports after the courses have begun.

To assign **COURSES** to Training Settings:

Navigate to Trainings > Select the Title of the Course > Settings > Offline Reports



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The screenshot shows the 'Course Attendees' page in Edvance360. On the left is a dark navigation menu with options like 'MY COURSE', 'LESSONS', 'COMMON CARTRIDGE', 'DISCUSSION', 'RESOURCES', 'PARENT RESOURCES', 'DROPBOX', 'CALENDAR', 'TESTS', 'SCORM', 'SURVEYS', 'GRADEBOOK', 'WIKI', 'CHAT', 'GROUPS', 'AGENTS', 'START & END DATES', and 'SETTINGS'. The 'START & END DATES' and 'SETTINGS' items are circled in red. The main content area shows 'Trainings > Course Details' with a 'Messages' notification. Below are 'Enroll Learner' and 'Print Roster' buttons. The 'Course Attendees' table has columns for 'Last Name', 'First Name', 'User Name', and 'Actions'. It lists two attendees: Terryl Shanlian (Susie) and Test Student (tstudent1), both with a 'Drop' action. On the right, there's a 'Facilitator' section for Terryl Shanlian and a 'Syllabus' section with a gear icon and two documents: 'The Vision Plan.doc' and 'Syllabus 2016'.

The screenshot shows the 'Course Settings' page with tabs for 'Modules', 'Details', 'Other', 'LTI', 'Offline Reporting', and 'Badges'. The 'Details' tab is selected and circled in red. The 'Format' field is set to 'Classroom', 'Source' to 'Selene', 'New Hire Training' to 'Yes', and 'Type' to 'Compliance'. The 'Duration' field is set to '0' and is circled in red. A 'Save' button is at the bottom. Five red arrows point to the 'Format', 'Source', 'New Hire Training', 'Type', and 'Duration' fields.

Note: A "DURATION" MUST BE KEYED IN SO THAT THE DATA WILL BE RECORDED IN THE OFFLINE REPORTING REPORT.

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To assign **LESSONS** to Training Settings:

Navigate to Trainings > Select the Title of the Course > Lessons > Edit Lesson (pencil icon)

The screenshot displays the 'A1 Leadership' LMS interface. On the left is a dark sidebar with a menu. The 'LESSONS' item is highlighted in yellow and circled in red. The breadcrumb path at the top right reads 'Trainings > Course Lessons > Edit Lesson', with the last two items circled in red. The main content area shows the 'Edit Lesson' form. The 'Name' field contains 'Lesson #1'. The 'Description' field contains the text 'This week we will be getting to know each other.' Below this are fields for 'Start date', 'Expire date', 'Status' (set to 'Publish'), 'Format' (set to 'Webinar'), 'Source' (set to 'Government Agency'), 'Type' (set to 'Human Resources'), 'Expected lesson duration in hours' (set to '1'), and 'New Hire Training' (set to 'New Hire Training (Within first 90 days of employment)'). Red arrows point from the sidebar to the 'Format', 'Source', 'Type', 'Expected lesson duration in hours', and 'New Hire Training' fields.

7 Adding Offline Training Completion to On Demand Report Data

If Admin users have had any (or desire to have any) ON Site/Campus Course or Training Sessions that they would like to include in the customized generated reports from within the LMS – (in addition to the completion of the courses completed within the LMS online) – Admin Users can

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select the option to “Add New” and manually enter in the information for these Instructor Led Courses.

Dropdown boxes are given for Admin users to select:

- a. The TRAINEE(S) involved in the newly created on site training.
- b. The FACILITATOR name (if the Facilitator is not already a user in the system, then the option of a NON Facilitator can be chosen Instead)
- c. The FORMAT of the on site Course – Classroom, online, etc.
- d. The SOURCE of the on site Course.
- e. Was this a New Hire Training – Yes or No? (only for Internal Corporate facilities)
- f. The DATE the on site Course took place.
- g. The overall Course TYPE – Compliance, Department, Leadership, etc.
- h. The DURATION of the on site course in ¼ hour increments.
- i. A GRADE if applicable.
- j. An option to APPROVE (via a check box) the Course to appear on that user’s transcript of completed courses.

The screenshot displays the 'Home' page of the Edvance360 system. On the left is a navigation menu with options like ACCOUNT, DASHBOARD, and REPORTS. The main content area is titled 'Home > Offline Reportings > Settings'. At the top of this area, there are tabs for 'Offline Reports', 'Add New', 'Settings', and 'Off Hours'. The 'Add New' button is circled in red. Below the tabs, there are several dropdown menus, each also circled in red: 'Trainee' (with a 'Select Trainee' link below it), 'Facilitators' (with 'Non-Company Facilitator' selected), 'Format' (with 'Classroom' selected), 'Source' (with 'Selene' selected), 'New Hire' (with 'Yes' selected), 'Date' (with an empty text input field), 'Type' (with 'Compliance' selected), and 'Duration' (with '75' selected). The 'Import' button is also visible below the 'Add New' button.

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Once the information has been added to the ADD NEW tab and saved, the information will show on the Learner report with a manually approved checked box in the approval column. See Screenshot.

Employees

Date	Title	Facilitator	Duration	Grade	Approved	Actions
Jane Doe						
05-06-2017	Dummy Title 2	Non-Company Facilitator	2.00	90.00	<input type="checkbox"/>	Edit Delete
06-10-2017	Dummy Title	Non-Company Facilitator	2.00	90.00	<input type="checkbox"/>	Edit Delete
04-14-2017	Training	Kate Admin	2.00	0.00	<input checked="" type="checkbox"/>	Edit Delete
04-27-2017	Dummy Title	Non-Company Facilitator	2.00	0.00	<input checked="" type="checkbox"/>	Edit Delete
04-08-2017	Dummy Title	Non-Company Facilitator	2.00	90.00	<input checked="" type="checkbox"/>	Edit Delete
05-15-2017	Training	Non-Company Facilitator	2.50	0.00	<input checked="" type="checkbox"/>	Edit Delete
07-07-2017	(Course) Word 101: The Basics		0.000		<input checked="" type="checkbox"/>	-
04-06-2017	(Course) A1 Leadership		0.000		<input checked="" type="checkbox"/>	-
03-16-2017	(Course) Healthcare CEU 101		0.000		<input checked="" type="checkbox"/>	-
04-07-2017	(Course) Common User		0.000		<input checked="" type="checkbox"/>	-

Learners “can” also be allowed the permission of manually adding their own Offline Training via the Add New tab if that Tab has been turned on as a permission for their User Role. Any Courses submitted via a Learner will show WITHOUT an approval, and must first be approved by an Admin user or a Supervisor in order to be added to that Learner’s record of course completion. Note: Admin users may decide if they want to Approve, Edit, or Delete these submitted Offline submissions via tools to the left of the Approved Column.

Date	Title	Facilitator	Duration	Grade	Approved	Actions
Jane Doe						
05-06-2017	Dummy Title 2	Non-Company Facilitator	2.00	90.00	<input type="checkbox"/>	Edit Delete
06-10-2017	Dummy Title	Non-Company Facilitator	2.00	90.00	<input type="checkbox"/>	Edit Delete
04-14-2017	Training	Kate Admin	2.00	0.00	<input checked="" type="checkbox"/>	Edit Delete
04-27-2017	Dummy Title	Non-Company Facilitator	2.00	0.00	<input checked="" type="checkbox"/>	Edit Delete

8 Choosing Content Filters for Customized Reports

The Content Filters provided in Offline Reporting help the Admin sort through which Trainings, Lessons, Dates, etc will appear on their customized reports. Each of the desired contents can be selected via a checkbox next to that content tile. There is also an option for Admins to decide if they would prefer to create a report based on user course completion or incompleteness. This preference is also decided via a checkbox.

Content Filters

Include Content Offline Trainings Lessons

Content Status Completed Incomplete

Trainings

Select Course

Lesson Approved

All All

Start End

2017/01/01 12:00:00 2017/12/31 12:00:00

Each one of the Content filters then pull from the list of created Content in the LMS and can be selected from a dropdown menu.

Trainings

- ✓ Select Course
- Ashley's Term - (ATD Truck Class 034) Week 6 Business Leadership
- Ashley's Term - A1 Leadership
- Ashley's Term - A1 Leadership
- Ashley's Term - Accountability
- Ashley's Term - ADA Testing

9 Exporting Customized Offline Report

Once the Admin User has appropriately selected from the dropdowns in all three filter areas, selects their date range and content preferences, and then SAVES – a report will generate from those filter selections and can be exported via the Export Offline Report button on the top right of their screens.

The screenshot displays the 'Offline Reporting Settings' page. On the left is a navigation sidebar with categories like ACCOUNT, DASHBOARD, REPORTS, and LITE WIZARD. The main content area shows the breadcrumb 'Home > Offline Reportings > Settings' and a top navigation bar with buttons for 'Offline Reports', 'Add New', 'Settings', 'Off Hours', and 'E-Mail Supervisor Report'. Below this is an 'Import' button. The 'Order By' is set to 'Date | Approval'. The 'User Filters' section includes a note that settings can be adjusted per user, and options for Status (Exempt, Non-Exempt, Contractor), Active (Active, Inactive), and a User dropdown menu. There are also dropdowns for Job Titles, Sites, Cost Centers, and Supervisors, each showing '1 selected'. The 'Training Filters' section has a note about course settings and dropdowns for Format, Facilitators, Source, and Type, all showing '1 selected'. The 'Content Filters' section includes radio buttons for 'Include Content' (Offline, Trainings, Lessons) and 'Content Status' (Completed, Incomplete), along with a 'Trainings' dropdown menu set to 'Select Course'. A red circle highlights the 'Export Offline Report' button in the top right corner.