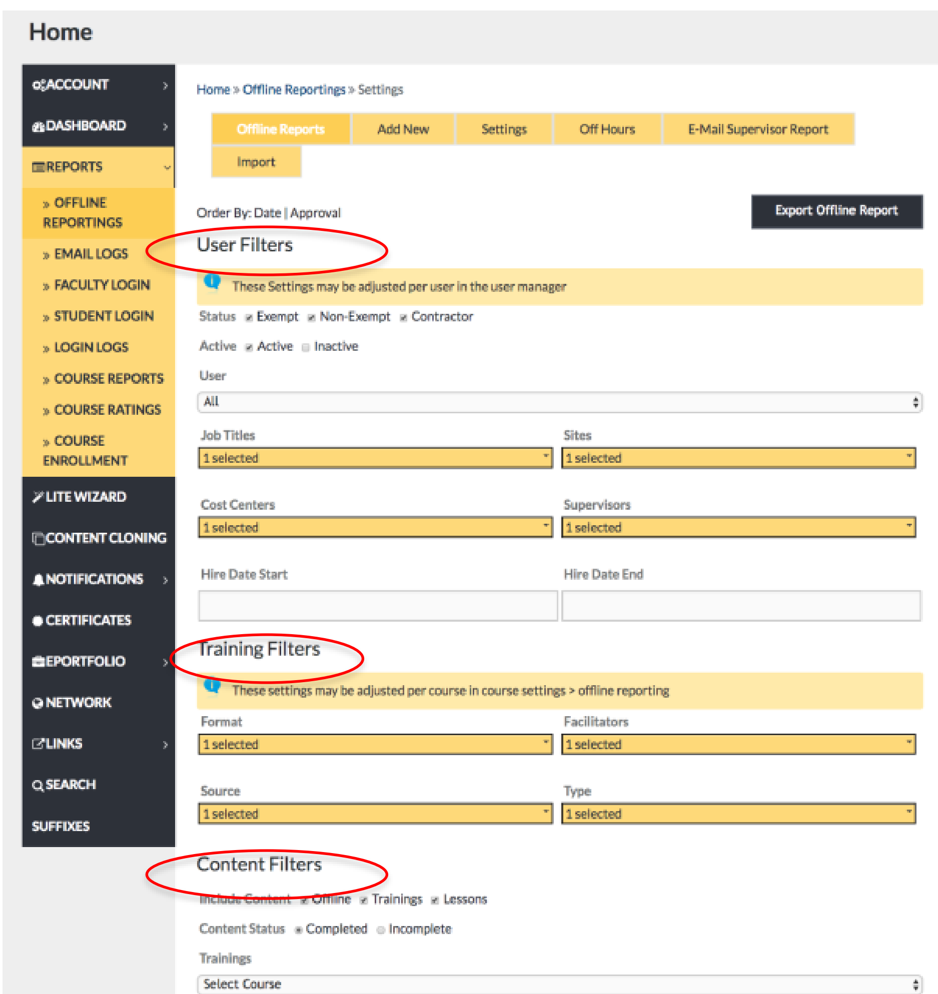
Edvance360 QUICKSTART GUIDE

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.



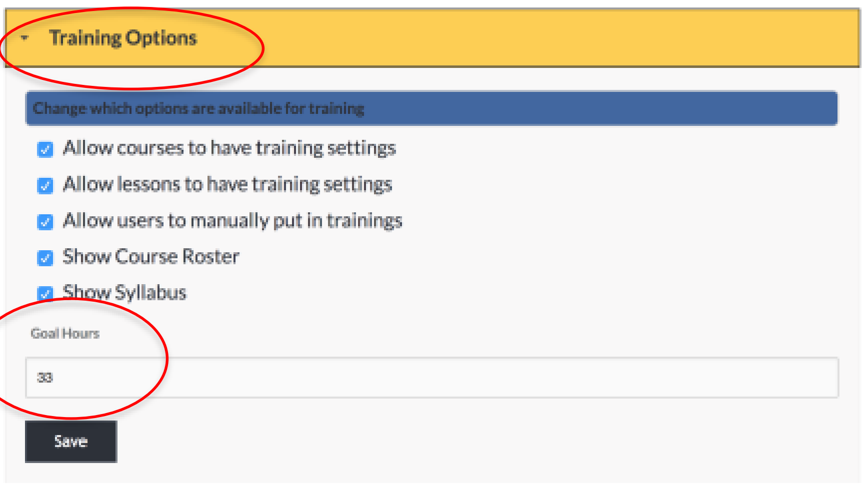
As a secondary function within Offline Reporting, Users may also be given the permission to submit any "Offline" Training to their personal record, with approval from a Supervisor and/or Admin. See Step 7 for more details on how to Add New Offline Trainings.

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.

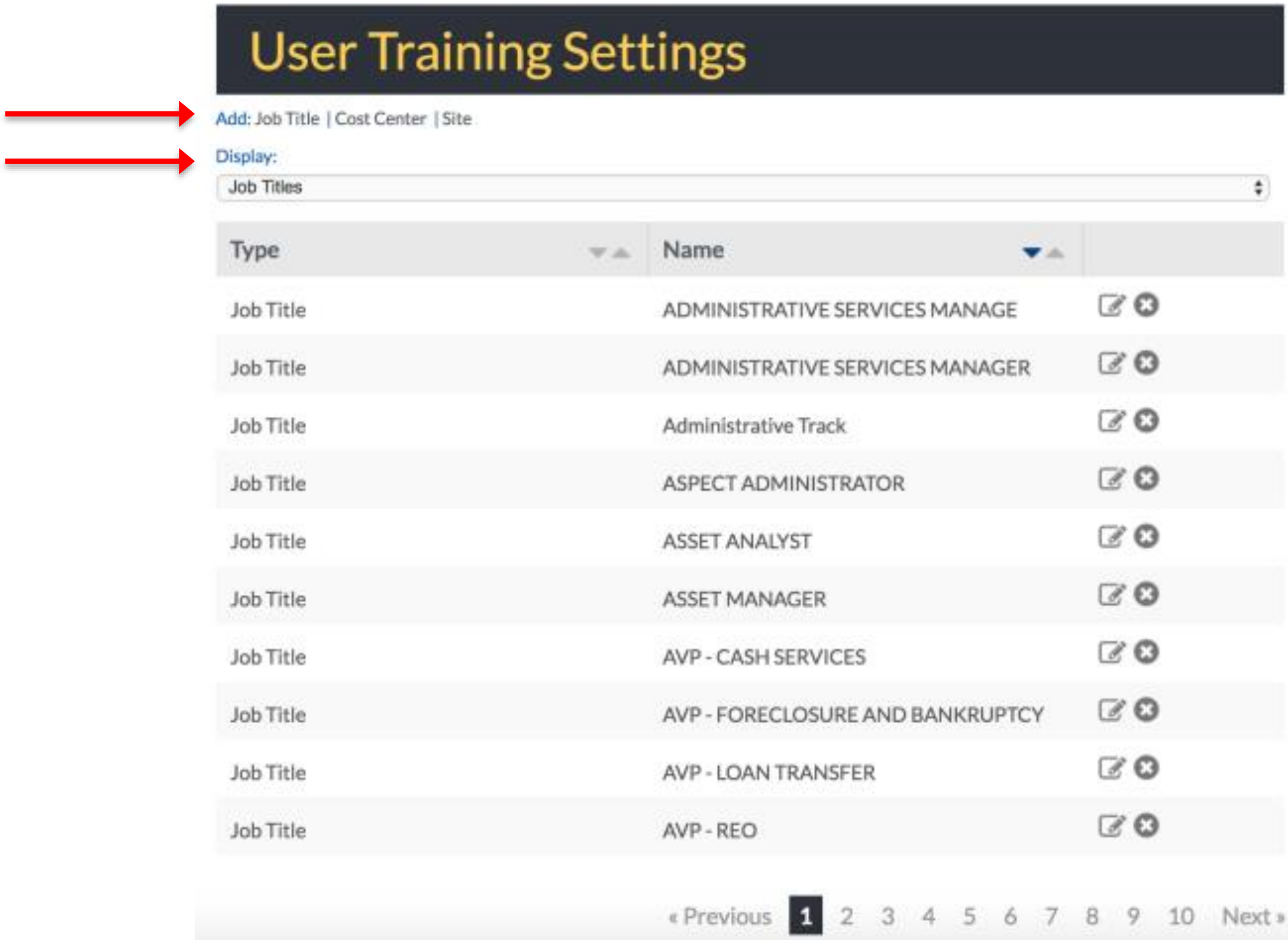
If a specified "Training Goal" is a mandatory requirement for a Client, Admins may key in a total of goal hours that users can track their progress toward before selecting the Save option.



2 Creating User Setting Filters

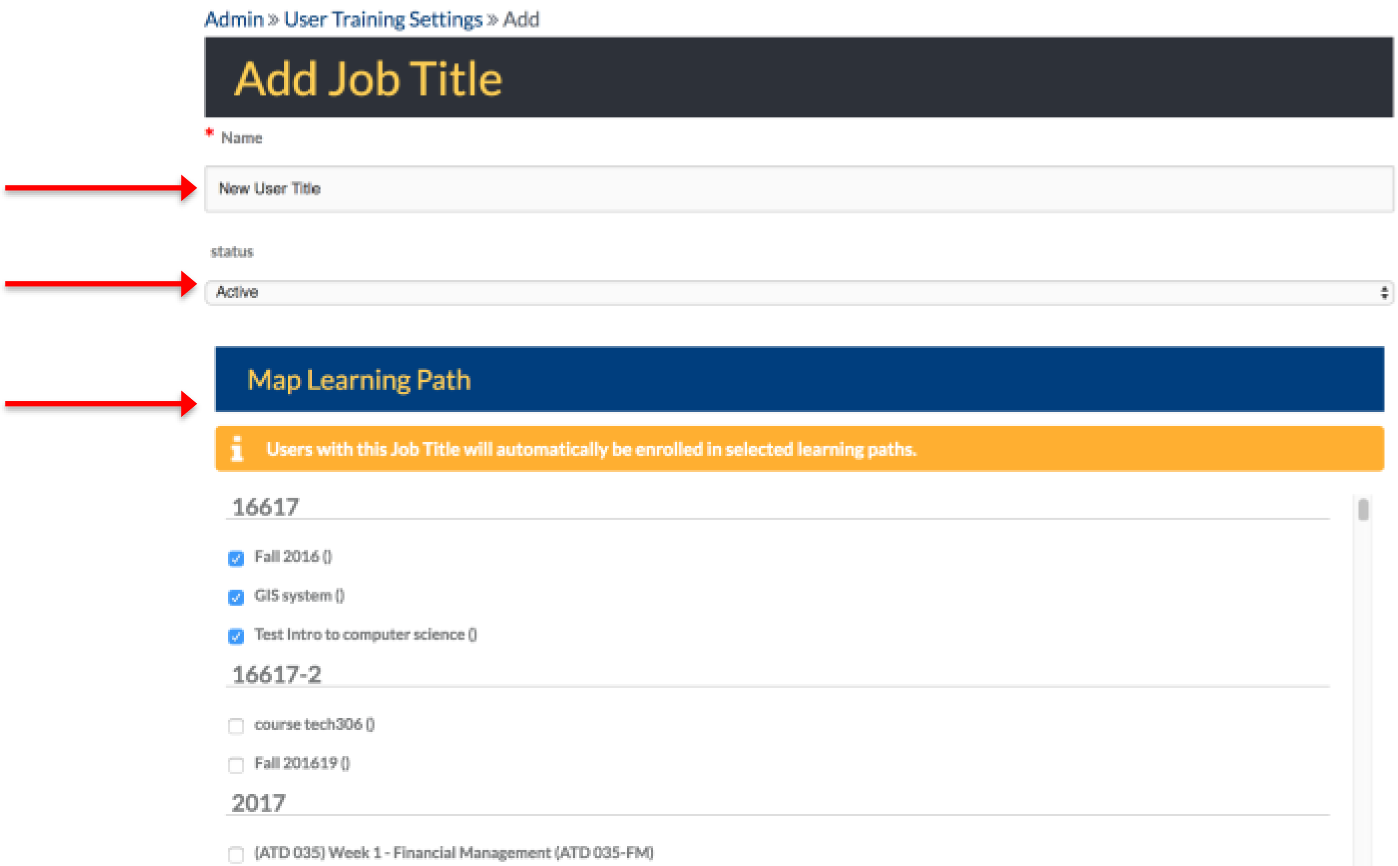
Navigate to: ADMIN > USER MANAGEMENT > USER TRAINING SETTINGS

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.

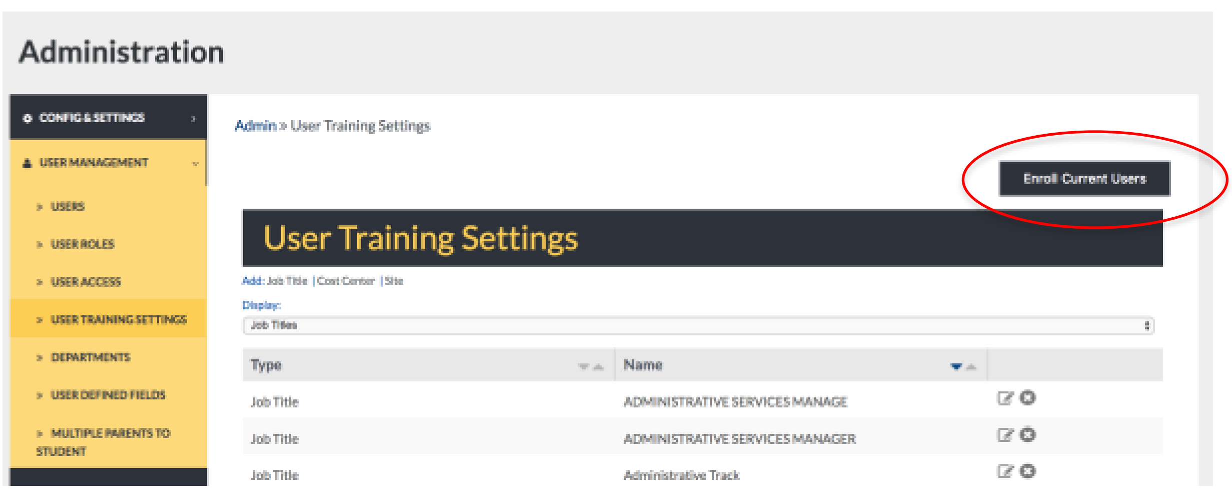


3 Assigning or Mapping Learning Paths to User Settings

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.



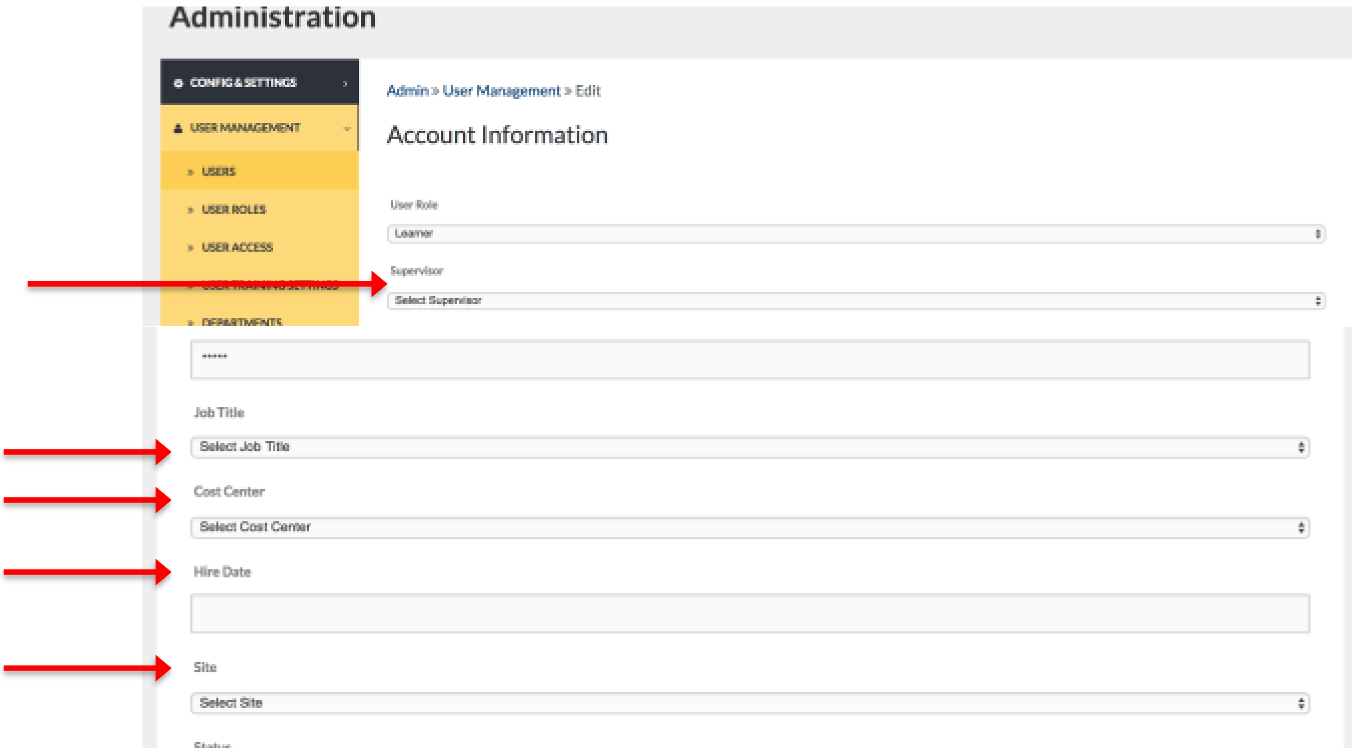
Note: If Users with existing User Settings have already been added to Courses, and an Admin is editing an Active setting or adding more courses to the previously created Learning Path, they will have the opportunity to return to the User Training Management screen upon submitting saved changes, and allow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



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.

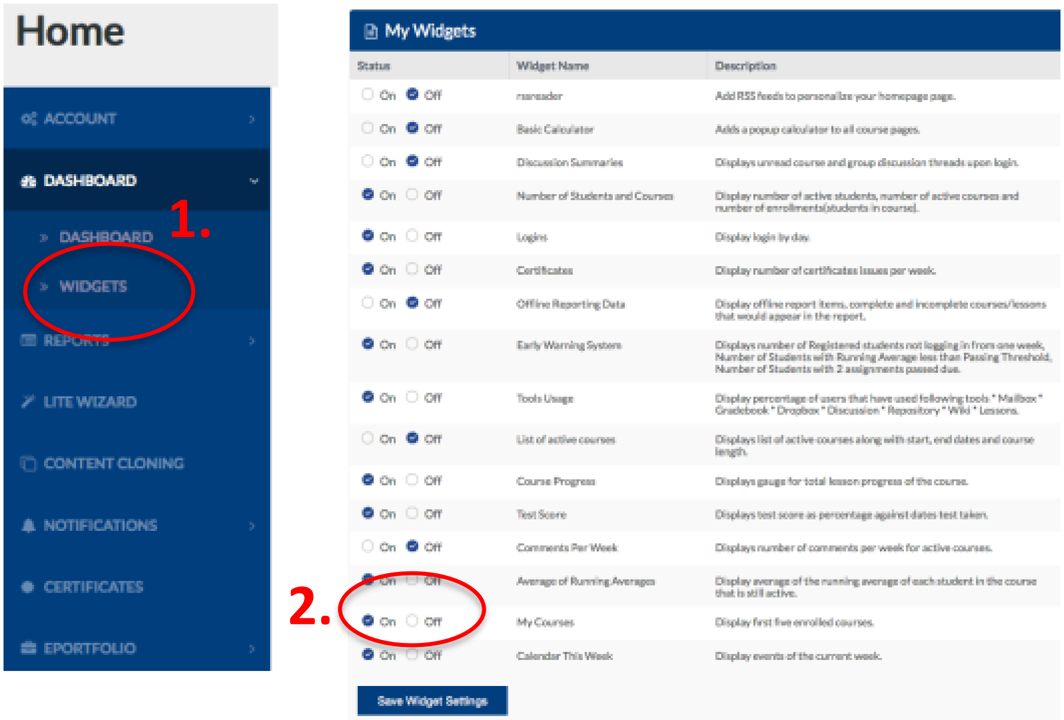
Note: Each User Setting (from above) can be assigned and updated from this same area. Any Supervisors selected from this edit area will be able to login to the Offline Reports panel and view and generate data for their direct reports.

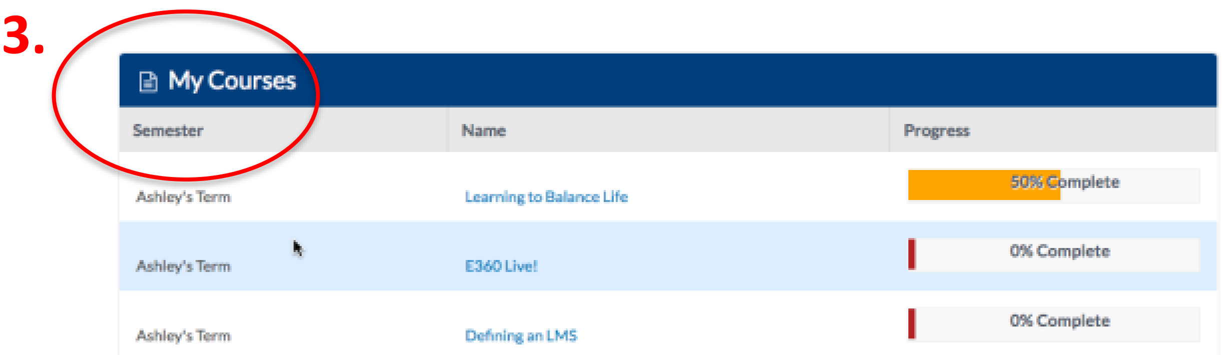


4 Activating HomePage Widgets

Navigate to: HOME> DASHBOARD > WIDGETS

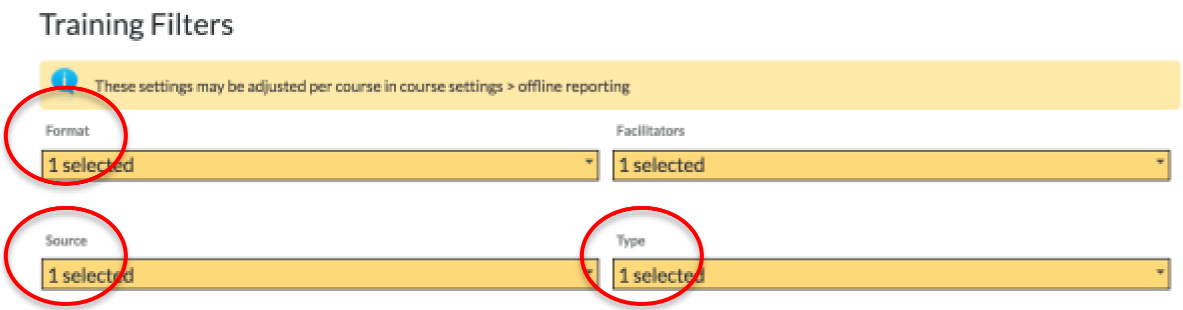
In order to create a shortcut for Learners to access their courses at login, they can select the homepage tool panel tab called DASHBOARDS>Widgets> and turn ON the My Courses tab and then save.
Once users return to their HomePage Dashboard, all courses that they are responsible to complete will appear on their homepage dashboards as a shortcut when they scroll down.


Home
ACCOUNT
DASHBOARD
DASHBOARD
1.
WIDGETS
REPORTS
LITE WIZARD
CONTENT CLONING
NOTIFICATIONS
CERTIFICATES
EPORTFOLIO
2.
My Widgets
Status
Widget Name
Description
On Off
rssreader
Add RSS feeds to personalize your homepage page.
Basic Calculator
Adds a popup calculator to all course pages.
Discussion Summaries
Displays unread course and group discussion threads upon login.
Number of Students and Courses
Display number of active students, number of active courses and number of enrollments(students in course).
Logins
Display login by day.
Certificates
Display number of certificates issues per week.
Offline Reporting Data
Display offline report items, complete and incomplete courses/lessons that would appear in the report.
Early Warning System
Tools Usage
List of active courses
Course Progress
Displays gauge for total lesson progress of the course.
Test Score
Displays test score as percentage against dates test taken.
Comments Per Week
Displays number of comments per week for active courses.
Average of Running Averages
Display average of the running average of each student in the course that is still active.
My Courses
Display first five enrolled courses.
Calendar This Week
Display events of the current week.
Save Widget Settings


3.
My Courses
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

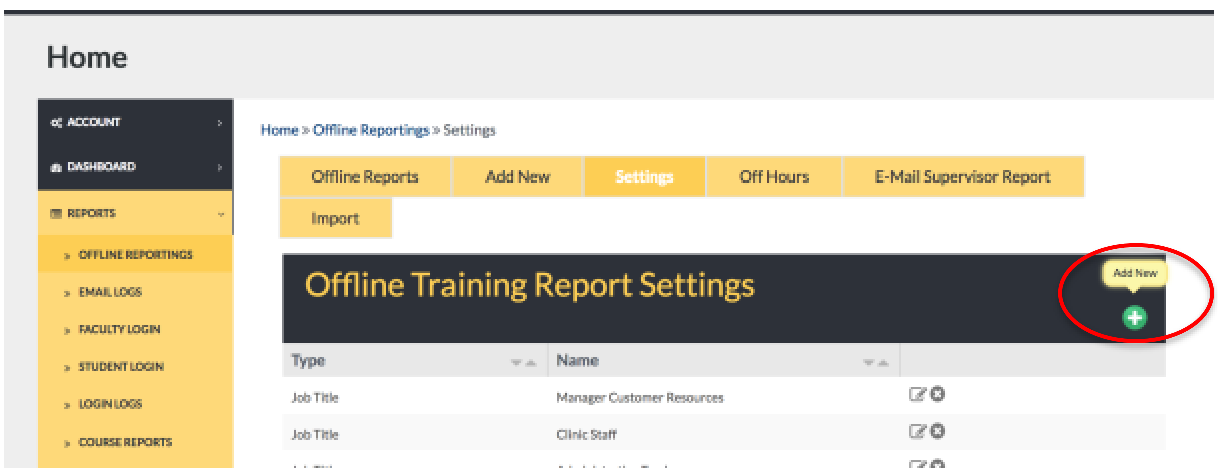
5 Creating Training Filters

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

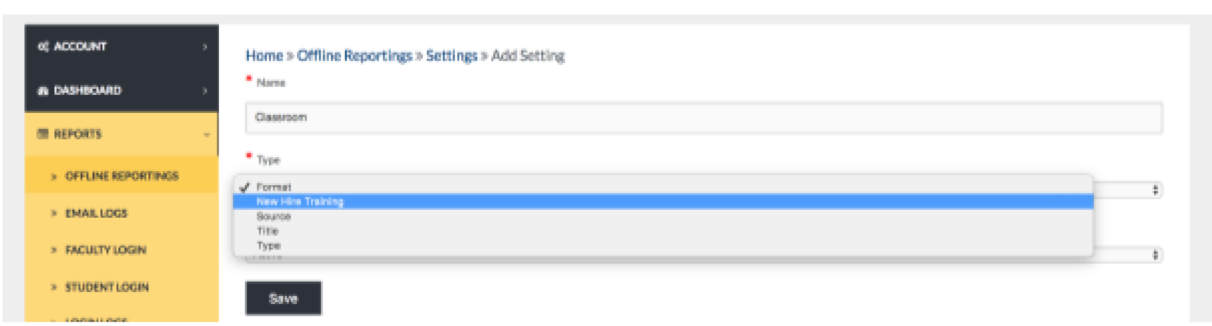


Navigate to: HOME > Offline Reporting > Settings > Add New to generate selections for these settings in the filter dropdowns.

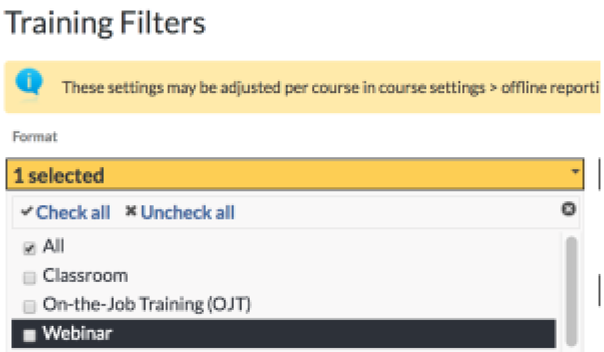
When the Add New screen opens, Admin users can key in the title of their User Setting, then select



the corrosponding setting from the dropdown and select save.



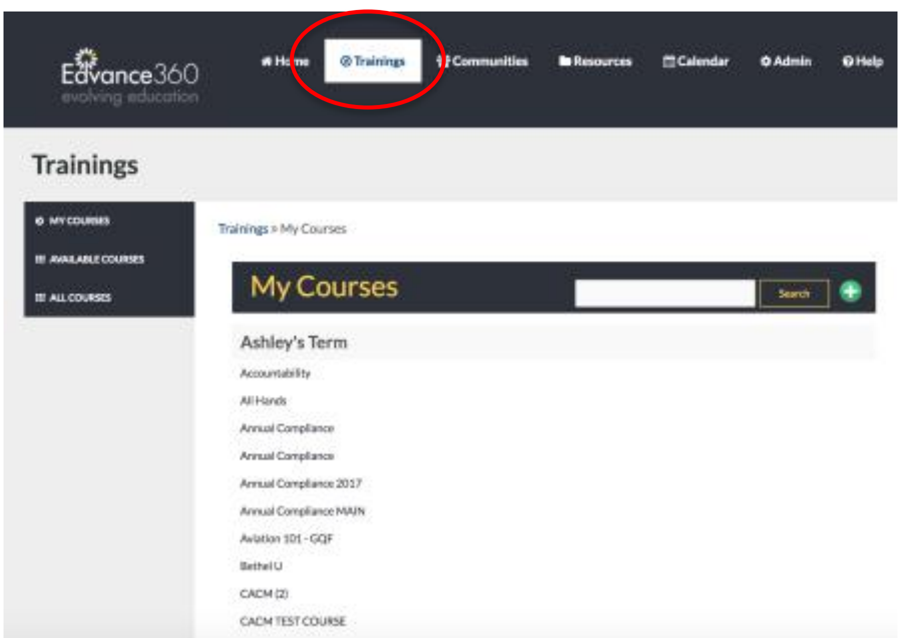
All added settings will then be viewable from the dropdown filters on the Offline Reporting homepage.

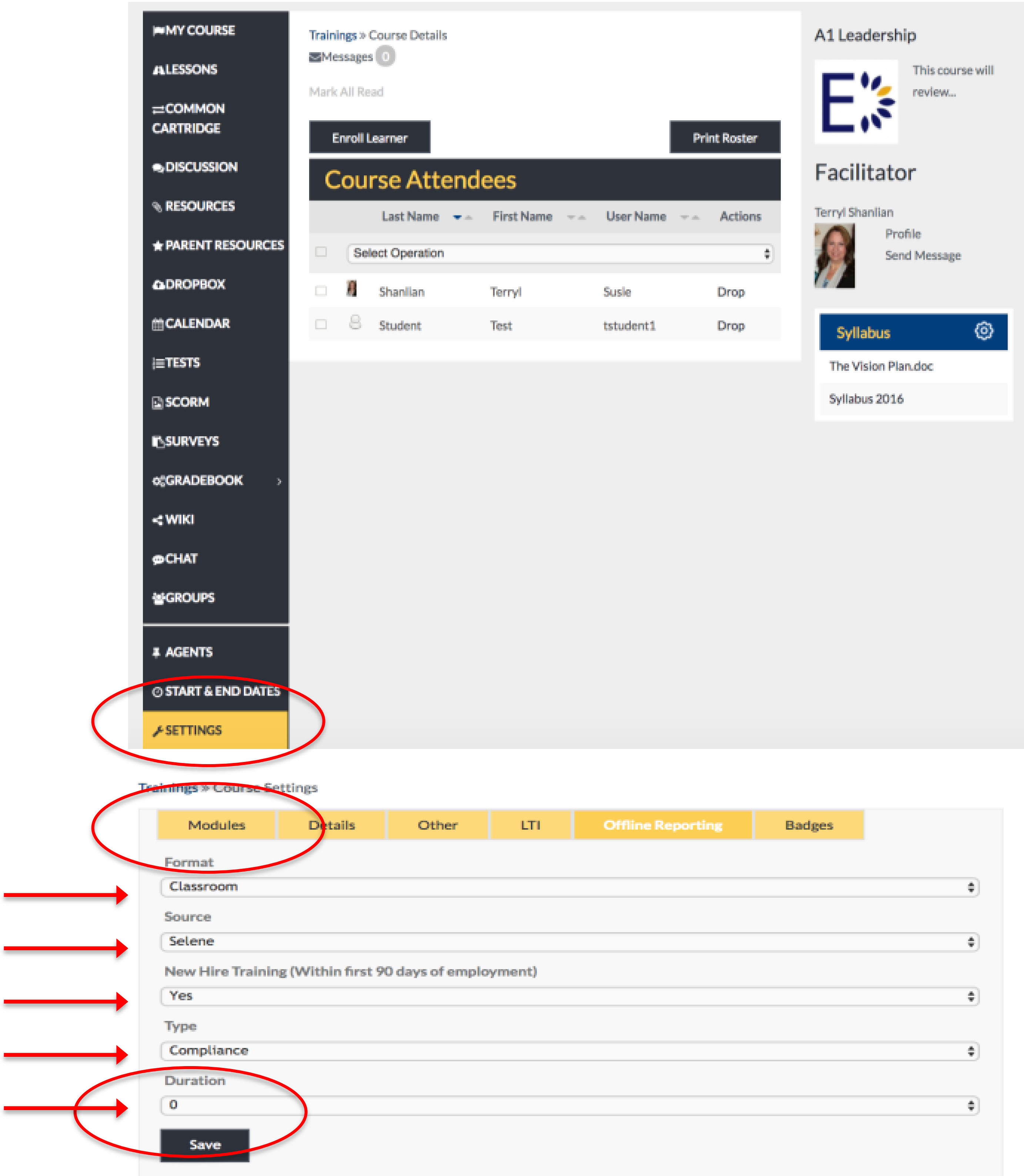


6 Mapping Courses and Lessons to Training Filter Settings

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.

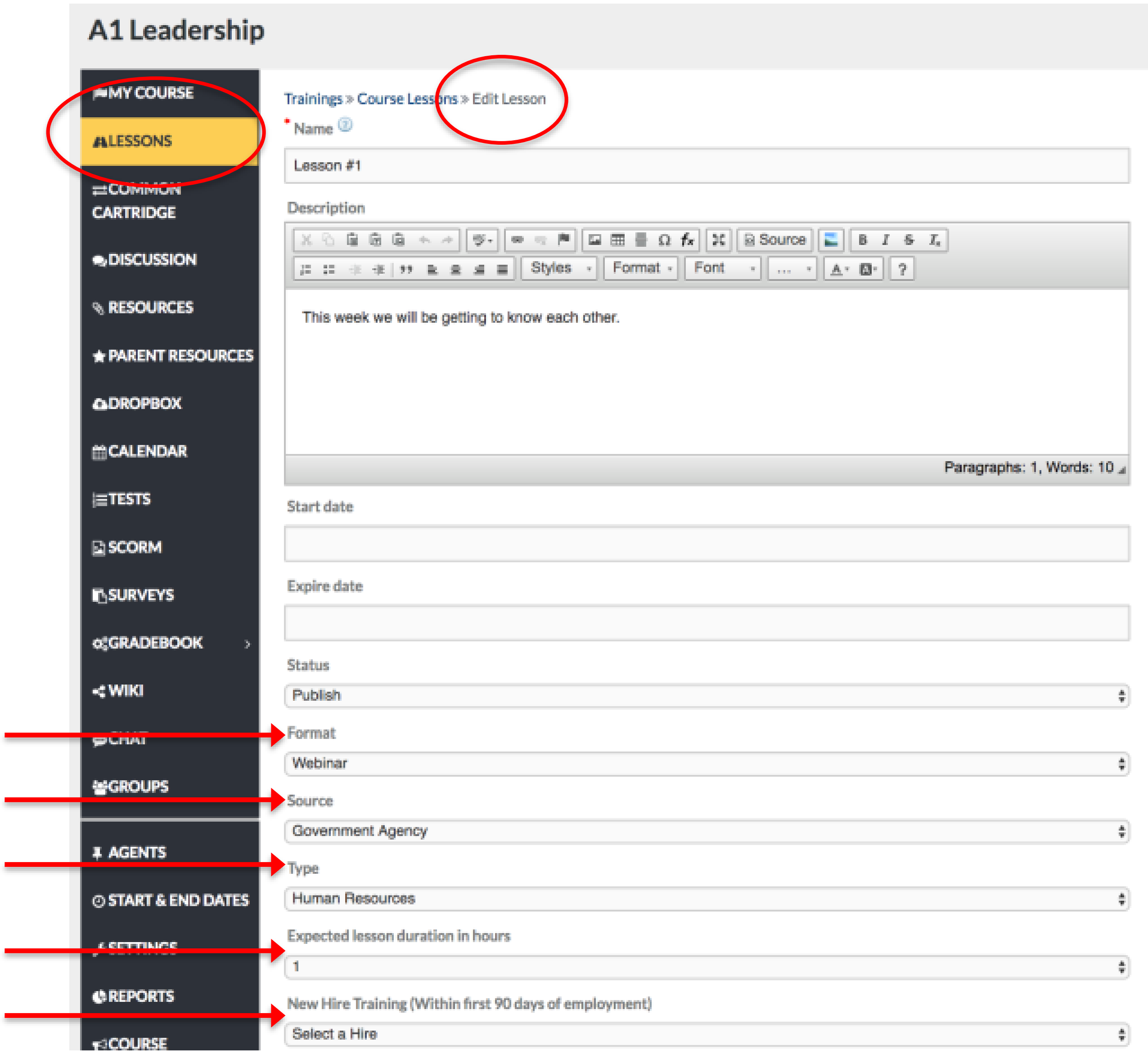
To assign **COURSES** to Training Settings:
Navigate to Trainings > Select the Title of the Course > Settings > Offline Reports





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

To assign **LESSONS** to Training Settings:
Navigate to Trainings > Select the Title of the Course > Lessons >Edit Lesson (pencil icon)

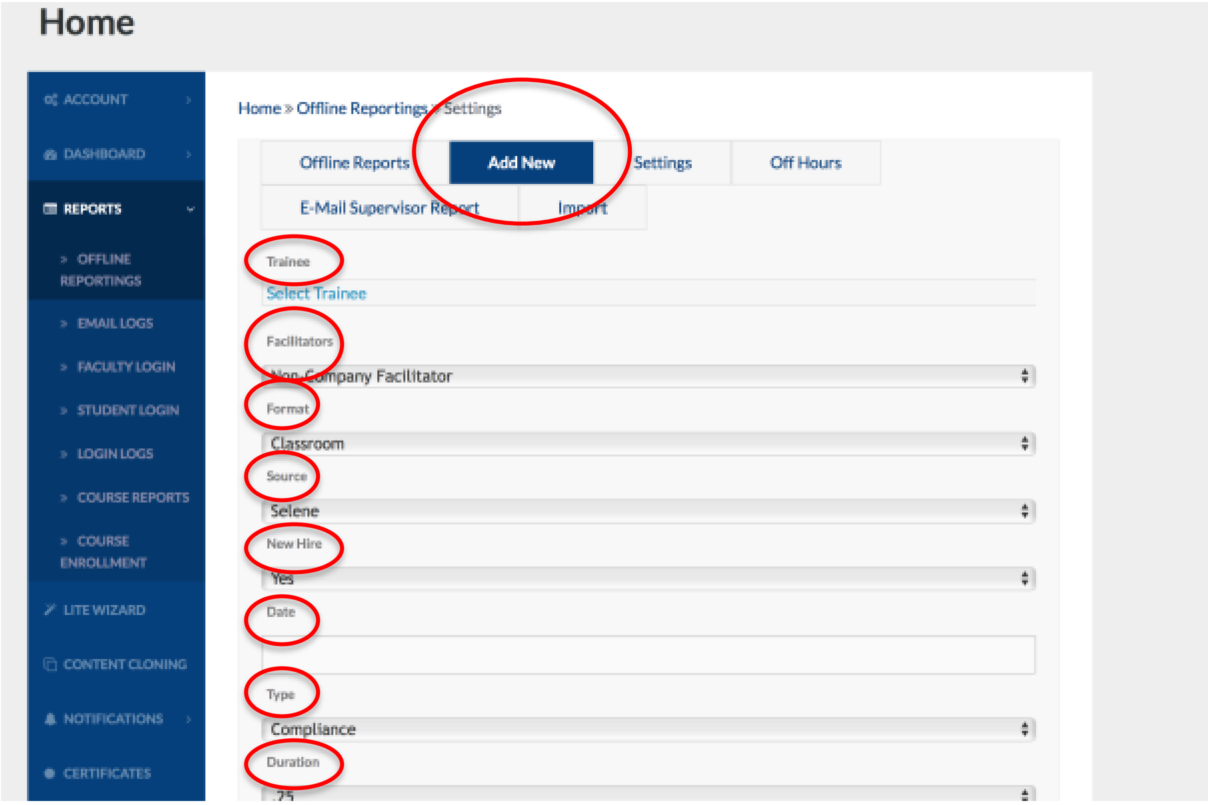


7 Adding Offline Training Completion to On Demand Report Data

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 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.



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

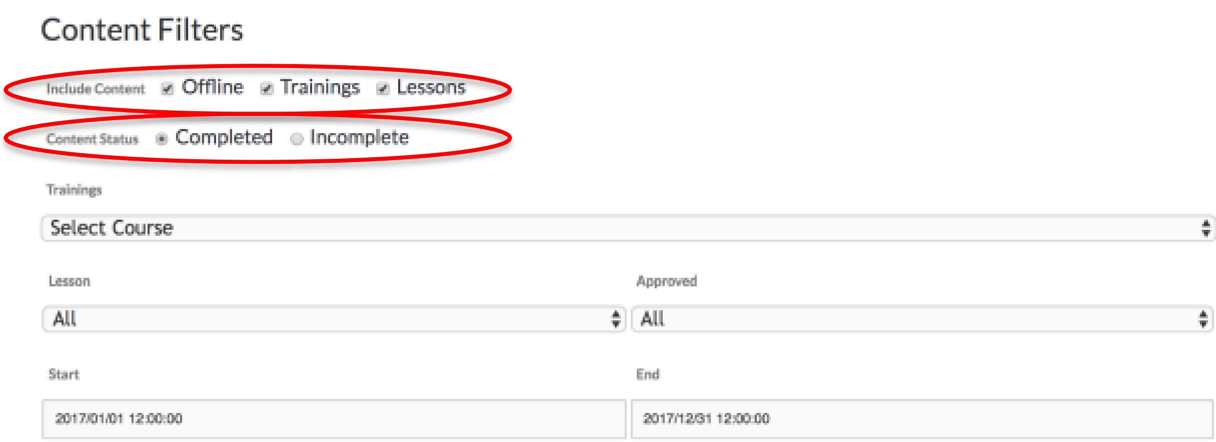
Date	Title	Facilitator	Duration	Grade	Approved	Actions	
Jane Doe							
05-06-2017	Dummy Title 2	Non-Company Facilitator	2.00	90.00	☐	Edit	Delete
06-10-2017	Dummy Title	Non-Company Facilitator	2.00	90.00	☐	Edit	Delete
04-14-2017	Training	Kate Admin	2.00	0.00	☑	Edit	Delete
04-27-2017	Dummy Title	Non-Company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

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.

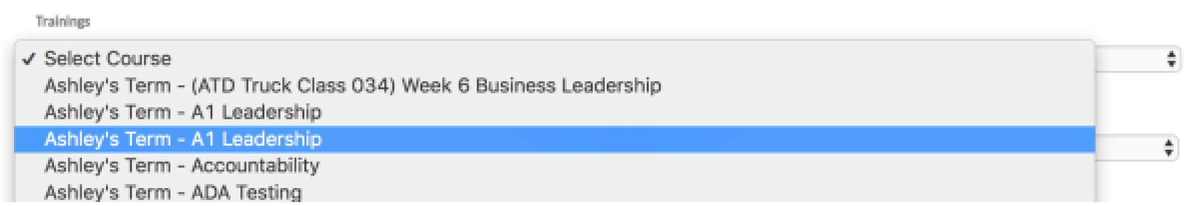
Date	Title	Facilitator	Duration	Grade	Approved	Actions	
Jane Doe							
05-06-2017	Dummy Title 2	Non-Company Facilitator	2.00	90.00	☐	Edit	Delete
06-10-2017	Dummy Title	Non-Company Facilitator	2.00	90.00	☐	Edit	Delete
04-14-2017	Training	Kate Admin	2.00	0.00	☑	Edit	Delete
04-27-2017	Dummy Title	Non-Company Facilitator	2.00	0.00	☑	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 incompletion. This preference is also decided via a checkbox.



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.



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.