Manager's Guide: Training Reports
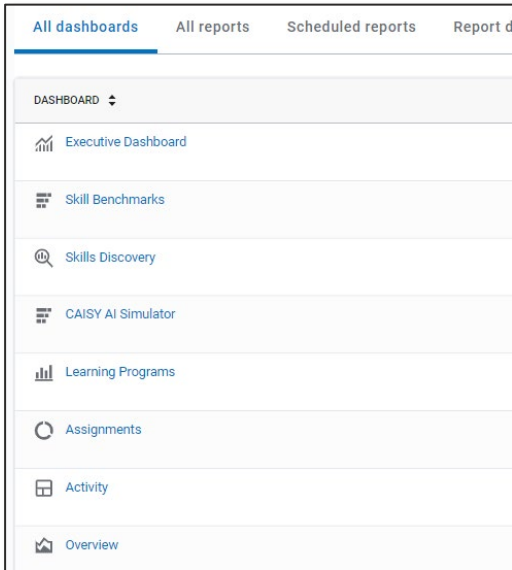
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Accessing Analytics

1. In Percipio, select **Switch to my manager view** if needed to see manager functions.

2. In the **Navigation Menu,** select **Analytics** to reveal dashboard and report options.

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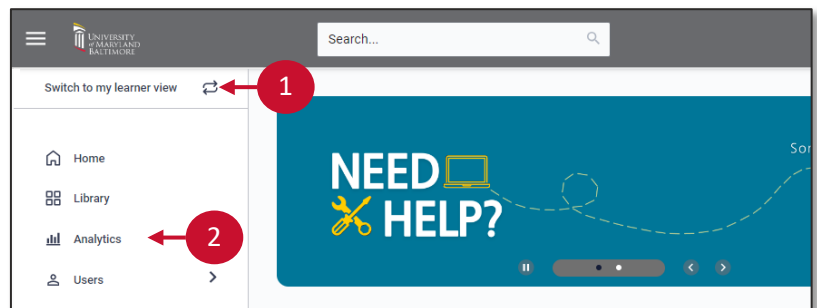
Manager's Guide: Training Reports

Available Dashboards

1. **Executive Dashboard** highlights metrics including adoption and achievement.
2. **Skill Benchmarks** displays metrics for employee skill benchmarks including completions and skill gains.
3. **CAISY AI Simulator** Displays a summary of what AI simulations learners are using to gain skills.
4. **Skills Discovery** gives insight into terms searched and skills chosen by employees.
5. **Activity Dashboard** shows how employees access content and learner activity trends such as audiobook hours or courses viewed.
6. **Assignment Dashboard** displays assignment percent completed and overdue.
7. **Overview Dashboard** shows overall employee platform engagement.

Available Reports
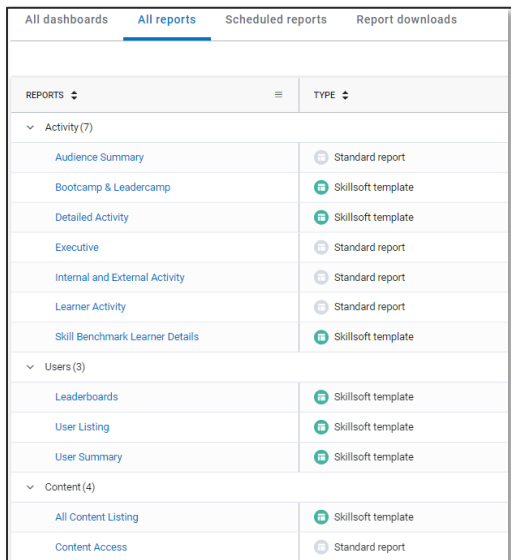
1. **Detailed Activity** generates a CSV of user details including duration, score, and completion status.
2. **User Summary** generates a CSV of general user details including a count of views, hours, and completions.
3. **Content Access** generates a CSV of all content accessed, total users who accessed it, and badges earned.
4. **Assignment Detail by User** Individual learner's activity and progress related to each content item within an assignment

And more!

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Frequently Used Dashboards

Assignments Dashboard

From the **Assignments Dashboard:**

1. Filter content by **date range, audience**, and **objective**.

2. Select **Update**.

3. An assignment progress summary displays.

Note: Scroll down to view a **Business Alignment** summary.

Skill Benchmarks Dashboard

From the **Skill Benchmarks Overview Dashboard:**

1. Filter content by **date range, audience,** and **keyword**.

2. Select **Update** to view the data.

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Frequently Used Reports

Detailed Activity Report

On the **Detailed Activity Report** page:

1. Filter content by **Date, Audience, User, Collection** or **content group, Asset type** (course, etc.), **Content title**, and/or **Language**

Note: Select **All Asset Types** in the **Asset Type** drop-down to include all content items.

1. Select **Run report**.

2. Select **Download report** to download the data.

Assignment Detail by User Report

On the **Assignment Detail by User Report** page:

1. Filter content by **date range**, **audience, user,** and/or **assignment title**.

2. Select **Run report**.

3. Select **Download report** to download the data.
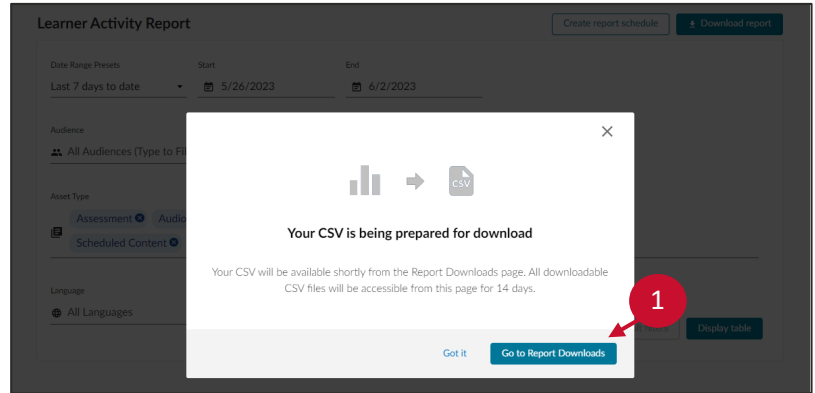

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View Downloaded Reports

After downloading a report, in the CSV pop-up window:

1. Select **Go to Report Downloads**.

Note: The **Report Downloads** page is also accessible directly through the **Analytics** page.
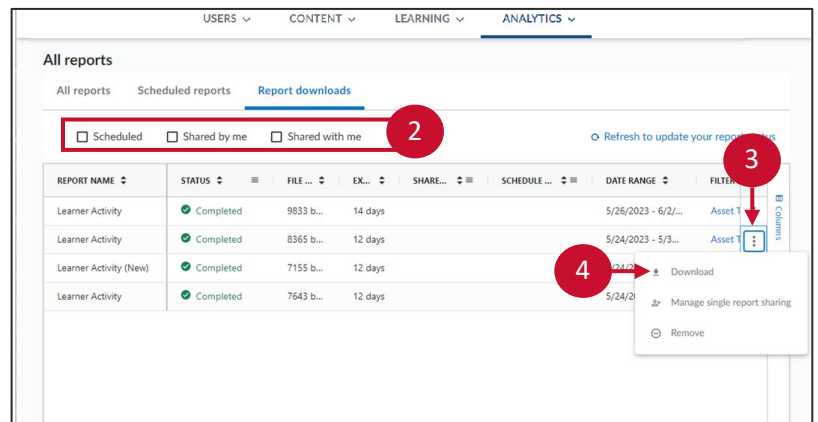
The **Report Downloads** page displays all generated reports within the last 14 days.

2. Filter the displayed reports using the checkboxes for **Scheduled**, **Shared by me**, and **Shared with me.**

To download a specific report:

3. Select the **three vertical dots** menu.

4. Select **Download** to display data in a CSV file.

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Share a Report

On the **Report Downloads** page:

1. Select the **three vertical dots** menu next to the desired report.

2. Select **Manage single report sharing**.
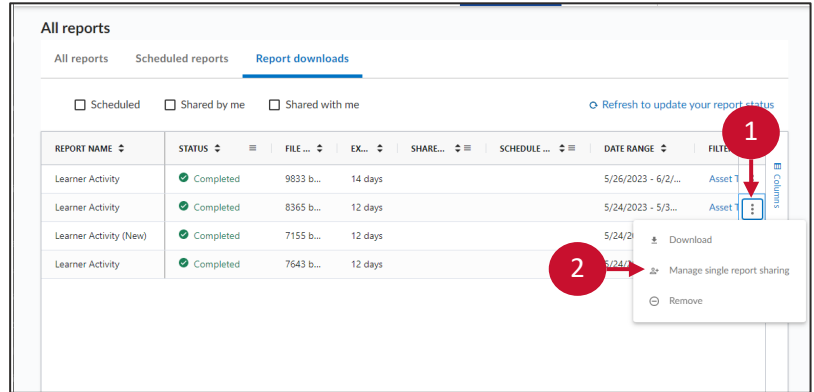
3. In the pop-up window, enter the user(s) information.

4. Select **Share report.**

Note: if you would like to stop sharing a report that you have previously shared, select **Stop sharing.**
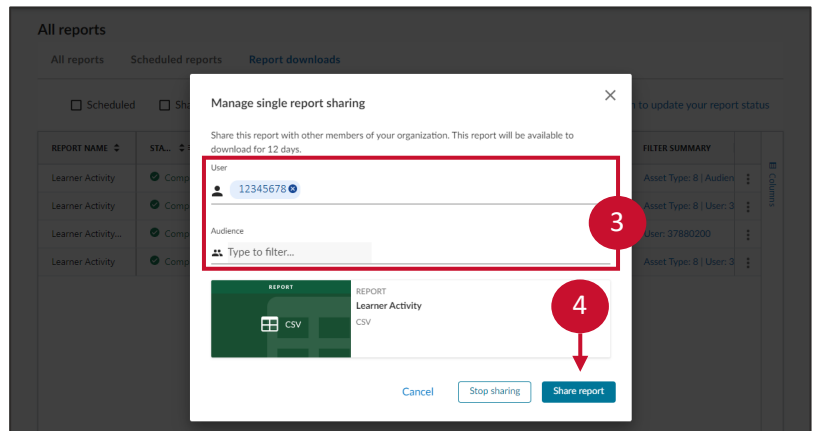
To share the report as an email:

5. Enter a custom message.

6. Select **Send email** to send the message directly from Percipio.

To share the report separately:

7. Select **Copy link.**
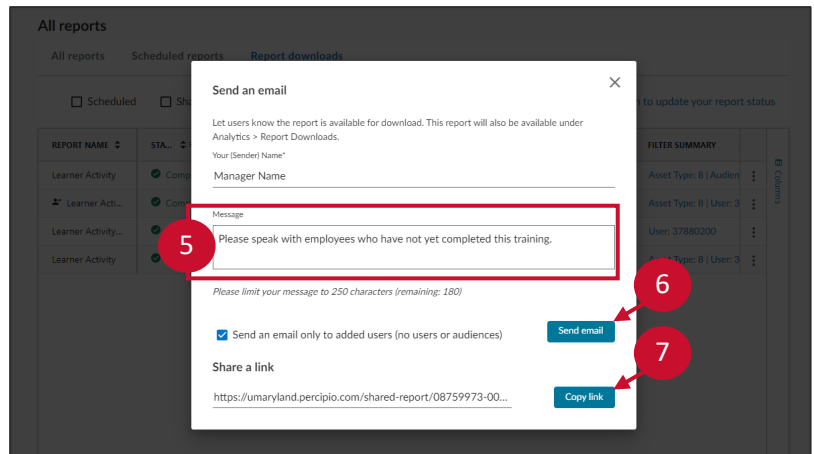
Schedule a Report

On the chosen report page:

1. Set the desired report parameters. Then, select the **Run Report** button.

2. Select the **Actions** drop-down menu.

3. Select **Create Report Schedule**.
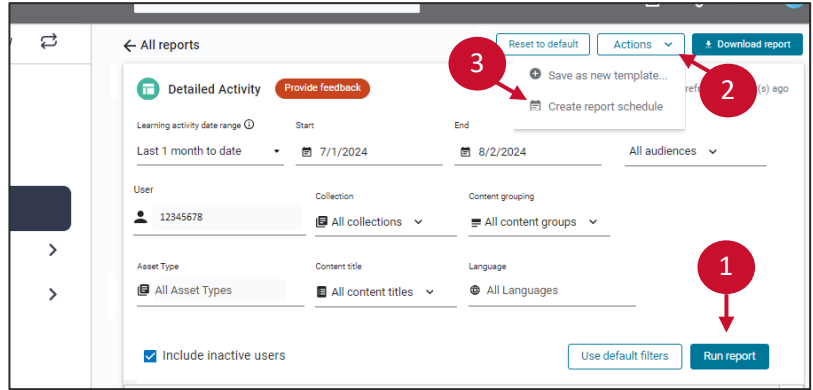
In the pop-up window:

4. Title the report.

5. Choose the dates during which you would like the report to run.

6. Determine the reporting frequency.
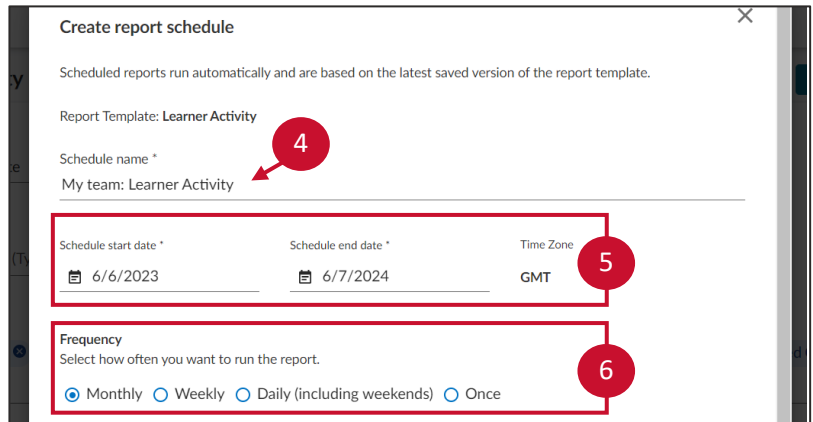
7. Determine the range of dates you would like to include in the report.

8. Select **Create Report.**
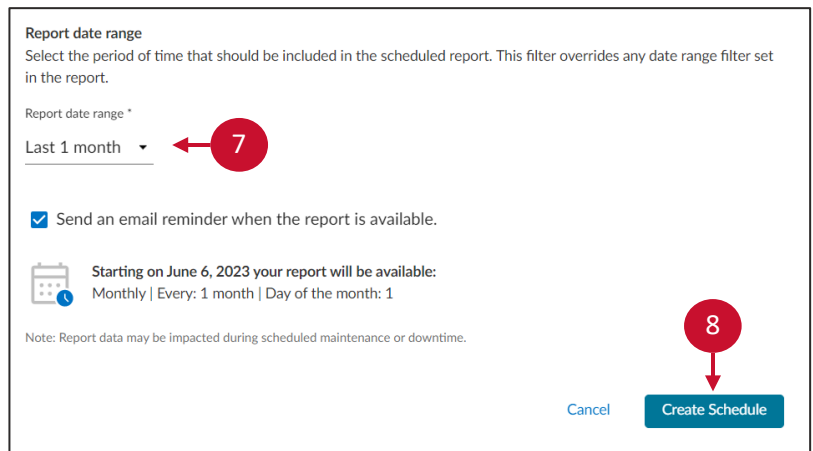
Schedule a Report (Continued)

8. If you are the only viewer for the report, select **Done**.

9. To share the report, select **Share Scheduled Report.**

Your report is scheduled!

Report name:	Learner Activity
Schedule name:	My team: Learner Activity
Schedule duration:	June 6, 2023 - June 7, 2024
Schedule frequency:	Monthly	Every: 1 month	Day of the month: 1
Report date range:	Last 1 month

Edit report   Share scheduled report   Done

10. Add the users and/or audiences with whom you would like to share the report.

Share scheduled report

You can share a scheduled report with any Percipio user and/or audience in your organization. Each time the schedule runs, Percipio uses the last saved version of the report template.

Starting on June 6, 2023 your report will be available:
Monthly | Every: 1 month | Day of the month: 1

Share with users (up to 10)
👤 Type to filter…

Share with audiences (up to 10)
👥 Type to filter…

11. Customize the email message as desired.

12. Select **Share Scheduled Report**.

Note: if you would like to stop sharing a report, select **Stop sharing.**

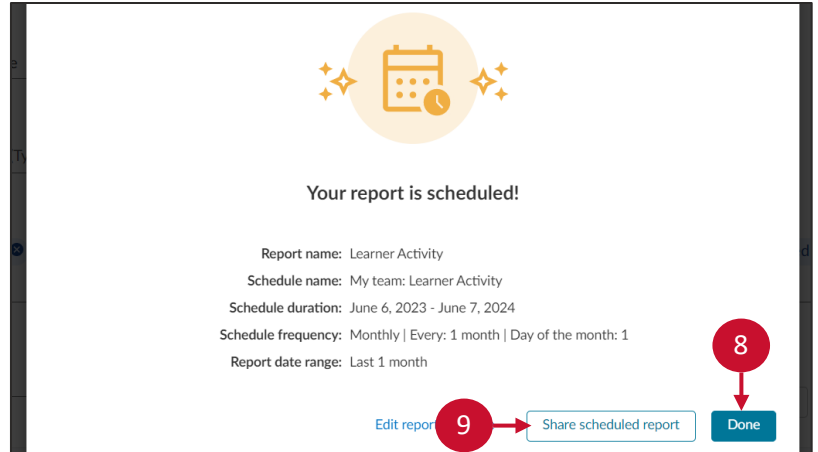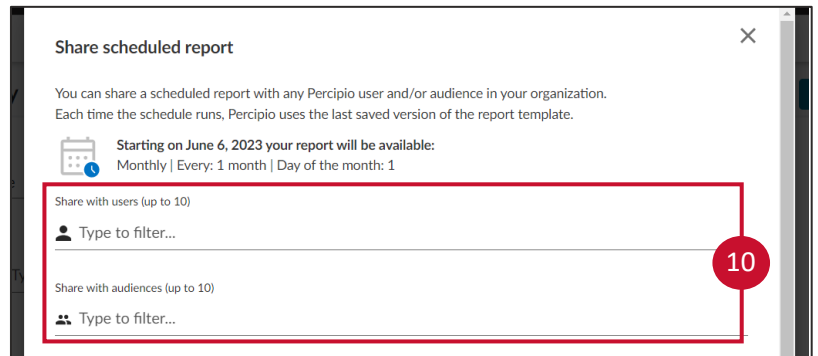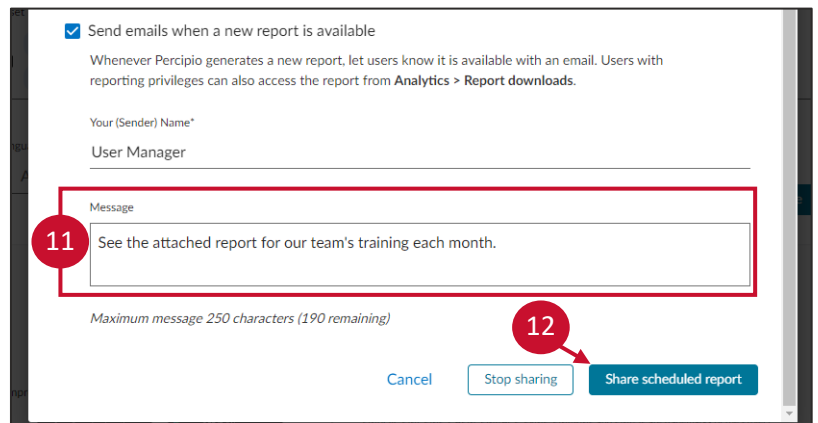☑ Send emails when a new report is available

Whenever Percipio generates a new report, let users know it is available with an email. Users with reporting privileges can also access the report from **Analytics > Report downloads**.

Your (Sender) Name*

User Manager

Message

See the attached report for our team's training each month.

Maximum message 250 characters (190 remaining)

Cancel   Stop sharing   Share scheduled report

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Compliance Reporting

1. Compliance-specific reports are automatically delivered to department heads via email every 30 days.

2. Supplemental reports can be requested using the request form.