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### **Accessing Analytics**

- In Percipio, select Switch to my manager view if needed to see manager functions.
- In the Navigation Menu, select Analytics to reveal dashboard and report options.



## Available Dashboards

All dashboards	All reports	Scheduled reports	Report d
DASHBOARD 💠			
Executive Das	hboard		
Skill Benchma	arks		
() Skills Discove	ry		
CAISY AI Sim	ulator		
III Learning Prog	Irams		
C Assignments	Assignments		
Activity			

### Available Reports

All dashboards	All reports	Scheduled rep	orts Report downloads
REPORTS 🗢		=	TYPE 🗘
<ul> <li>Activity(7)</li> </ul>			
Audience Sum	mary		Standard report
Bootcamp & Lo	eadercamp		Skillsoft template
Detailed Activi	ty		Skillsoft template
Executive			Standard report
Internal and Ex	ternal Activity		Standard report
Learner Activit	у		Standard report
Skill Benchmar	k Learner Details		Skillsoft template
<ul> <li>Users (3)</li> </ul>			
Leaderboards			Skillsoft template
User Listing			Skillsoft template
User Summary			Skillsoft template
<ul> <li>Content (4)</li> </ul>			
All Content Lis	ting		Skillsoft template
Content Acces	s		Standard report

- **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.
- 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.
- 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.
- 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!



Assignments

### Frequently Used Dashboards

### Assignments Dashboard

From the Assignments Dashboard:

- 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.

#### Business Objecth Date Range Preset 🚉 Manager Name 🛛 🛽 🕲 I All objective 1 Last 3 months to date • Assignment Progress signment progress is based on the total number of assignments that are assigned within the selected date ra Assignment Summary Assignment Progress 3 ASSIGNMENT TITLE ASSIGNED BY LEARNERS % COMPLETED % OVERDL Example Title 1 100% 2 0 1 O Cancele

### Skill Benchmarks Dashboard

#### From the Skill Benchmarks Overview Dashboard:

- Filter content by date range, audience, and keyword.
- 2. Select **Update** to view the data.







### **Frequently Used Reports**

### **Detailed Activity Report**

On the **Detailed Activity Report** page:

 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.

 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.









All reports

### Share a Report

On the **Report Downloads** page:

- Select the three vertical dots menu next to the desired report.
- 2. Select Manage single report sharing.
- 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**. All reports Scheduled reports Report download □ Scheduled □ Shared by me □ Shared with me O Refresh to update voi REPORT NAME STATUS \$ FILE ... 💠 EX... \$ SHARE.... ¢ ≡ SCHEDULE .... ¢ ≡ DATE RANGE 💠 Learner Activity Completed 9833 b.. 14 days 5/26/2023 - 6/2 Completed 8365 b... Learner Activity 12 days 5/24/2023 - 5/3. Learner Activity (Ne Completed 7155 b... 12 day 5/24/2 \* Do 7643 b... Learner Activity Completed 12 days

	🗖 Sha	Manage single report sharing	×	to update your report
REPORT NAME	STA \$	Share this report with other members of your organization. This report will be available to download for 12 days.		FILTER SUMMARY
Learner Activity	Comp	User 12345678 0		Asset Type: 8   Audien
Learner Activity	🔮 Comp		6	
Learner Activity	🔮 Comp	Audience	3	
Learner Activity	🔮 Comp	K Type to niter		
		Learner Activity		

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.





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### Schedule a Report

On the chosen report page:

- Set the desired report parameters. Then, select the **Run Report** button.
- 2. Select the **Actions** dropdown menu.
- 3. Select Create Report Schedule.

0 ← All reports 3 Detailed Activity Last 1 month to date € 7/1/2024 8/2/2024 All audiences User Collection Content grouping 12345678 I All collections ∨ = All content groups ~ > Asset Type Content title Language All Asset Types All Language > All content titles ~ Use default filters Include inactive users

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.

create report schedule			$\sim$
Scheduled reports run automa	tically and are based on the latest sav	ed version of the report template.	
Report Template: Learner Acti	vity		
Schedule name *	4		
My team: Learner Activity			
Color dada atart data t	Calculate and data 1	Time Zono	
E 6/6/2023	E 6/7/2024	GMT 5	
Frequency Select how often you want to	rup the report		
Select now orten you want to	run me report.	6	

- 7. Determine the range of dates you would like to include in the report.
- 8. Select Create Report.





### Schedule a Report (Continued)

- If you are the only viewer for the report, select **Done**.
- To share the report, select Share Scheduled Report.



 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)	10

- 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.



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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 <u>request form</u>.



