Kallidus

Standard Reports in Learn and Perform

This document explains the standard administrator reports available to you. It summarises the principle purpose of the report, which (if any) up-front prompts are available, and which (if any) document-level input controls have been made available. Where appropriate, there is advice on how and when (and when not) to use each report.

The document contains a short glossary of terms which will help you understand what we mean by terms such as ‘query-level data restrictions’, ‘up-front prompts’, ‘input controls’, etc. Please refer to that glossary if you are unsure about such terms.

Immediately after the Table of Contents you’ll see a one-page summary from Gary Marlow. In it he gives you a customer’s eye view of which reports he used the most when he ran the Learning & Development function at an organisation which used the Kallidus suite of products. He now works for Kallidus so understands reporting from both sides of the fence. Gary also lists his top tips for making the most of standard reports in Learn and Perform.

Don’t forget that the Academy is another source of rich information – with many easy-to-follow video lessons – which will help you get much more from Kallidus Reporting. If you already have an Academy user account, head over there anytime to take a look. And if you don’t yet have an Academy account, speak to your Customer Experience Manager about getting one created for you.

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Tips for making best use of the standard reports – Gary Marlow

I spent eight years as a Kallidus customer before joining the company as an employee. That means I've seen reporting from both sides of the fence. Here are the tips I'd like to share.

- Good site governance in both Learn and Perform will make your reporting easier. Whether that's consistent coding conventions for your lessons and courses, ensuring custom user fields are all correctly populated, or being meticulous about groups and categories, the more effort you put into good admin the easier it will be to report on your data.

- When running a report, make best use of the up-front prompts. They are there to help you down-select the data that is returned. Think of it as a bit like an online shopping order – don't have the report deliver things which you don't need!

- Look out for the Input Controls that are built into many reports. You can find them by clicking the third button on the vertical toolbar that appears on the left-hand side of the screen. Input Controls allow you to 'slice and dice' your data on the fly when the report has run.

- If you have configured Learn to set some lessons to periodically repeat, take time to make sure that you are running the most suitable reports for that. My advice if that's the case would be to focus more on the **Course Compliance Report** and the two **Accreditation** reports (**Detail** and **Trajectory**) rather than use the **Course Summary Report** and the **Training Status: All Training Report**. Have a good read of the descriptions of all five of those reports in this document for more information.

- Think before you hit the 'Save as…' button. It's fine to create your own versions of the standard reports if you definitely need to make tweaks to them. But ask yourself first whether some amends to the up-front prompts and the input controls/filters in the report can reduce your need to create saved versions.

- Finally, my top five most commonly run reports during my days as a customer were:

    - Course Compliance Report
    - Accreditation Detail Report
    - Event Attendees Report
    - All Courses Report
    - Perform Reviews Report

Glossary of terms used in this document

Query-level data restrictions

A Learn or Perform report is made up of one or more data ‘queries’ that run against the system database. These queries run in the background. Think of them as being like an online shopping order. When we build a standard report, it is common for us to include some background (or query-level) data restrictions. For example, a query-level data restriction may say that only enabled users or enabled courses should be returned in the report. In each of the report descriptions that follow, we make clear which query-level data restrictions are in place for each standard report.

Up-front prompts

When you run a standard report, most (but not all) will display an up-front prompts window. This enables you to down-select the data that is returned in your report. Making a selection at this point will often make the report run more quickly. In the report descriptions that follow, we make clear which data items are available for each standard report. In most cases an up-front prompt is optional (meaning you can ignore it to return all data), but on some occasions a prompt will be mandatory (meaning that you must make at least one selection before the report will run).

Input controls

Input controls are pre-built into many of the standard reports. They are available via the vertical panel on the left of the report screen. Input controls can be used to ‘slice and dice’ your data once the report has run. In the descriptions that follow, we have listed any document-level input controls which appear in each standard report. By ‘document-level’, we mean any input control that will dynamically adjust all the tabs in the report.

Report tabs

Almost every report has more than one report ‘tab’. These are similar to the tabs that you would see in a Microsoft Excel file. The tabs in a Learn or Perform report show different data views based upon the report that you have selected and any up-front prompts that you have selected. Typically the tabs get increasingly granular in detail. It is very common to see a tab entitled ‘Datasheet’. This is the most granular level of detail and is often a data view which a report user would export to Excel.

Learn Reports

Learn Report Title: All Users

Report Purpose:
This report provides a summary of how many users you have on the system. It breaks the number down between enabled and non-enabled users. In addition, a breakdown of users by LMS Role is provided. In the ‘Datasheet’ tab there is a column showing how many lesson uses each users has clocked up.

In-built query-level data restrictions:

- No restrictions at query level

Up-front prompts:

- This report runs without any up-front prompts

Input Controls:

- Slice by enabled/non-enabled users
- Slice by LMS Role
- Slice by Primary User Group
- Slice by Primary Job Profile

Report tabs:

- All users
- Datasheet

Usage tips:
This report can be used to check the number of active and inactive user accounts on Learn. Note that this report does not contain any detailed information about course and lesson usage so should not be used if you wish to report on learning progress.

Learn Report Title: All Groups

Report Purpose:
This report provides a summary of groups and group categories on the system. It highlights how many groups do not contain members, how many groups do not have any courses assigned to them and how many groups have been added to the system in the last 30 days. The report is designed to assist with site administration and governance.

In-built query-level data restrictions:
- No restrictions at query level

Up-front prompts:
- This report runs without any up-front prompts

Input Controls:
- The report does not contain any document-level input controls

Report tabs:
- Summary
- Groups with no users assigned
- Groups with no courses assigned
- Groups added in the last 30 days
- Datasheet

Usage tips:
This report is predominantly about site maintenance and governance. The data it contains enables you to keep your Learn site well-maintained. It is good practice to periodically review the number of groups you have on the system and potentially undertake clean-up work for any groups which are not needed. The report does not contain any learning-related data so do not try to use it for any kind of course or lesson completion analytics.

Learn Report Title: Sign-in History

Report Purpose:
This report provides insights into how many users log in to the system over specified time periods (note that the report will display the last 30 days as the default date range period). It shows how many of your enabled users have logged in during the date range period that you select. The report shows at what time and on which day they logged in. It also tells you on how many days there was no login activity across the system.

In-built query-level data restrictions:
- Only enabled users will appear in the report

Up-front prompts:
- Choose a start date for User Sign-in History Date (last 30 days is pre-selected)
- Choose an end date for User Sign-in History Date (last 30 days is pre-selected)

Input Controls:
- The report does not contain any document-level input controls

Report tabs:
- Summary by date
- Summary by LMS Role and Job Profile
- Logins by day and time band
- Datasheet

Usage tips:
This report enables you to analyse trends or patterns of login behaviour by users. It can pinpoint things like system usage over weekends, activity at different times of the day, etc. The report does not contain any learning-related data so do not try to use it for any kind of course or lesson completion analytics.

Learn Report Title: Users Who Have Not Signed In

Report Purpose:
This report shows users who have never signed into the system. It breaks down the data to show how many enabled users have never signed in and how many non-enabled users have never signed in. There is also a tab in the report that shows how many of the users have left. This is determined by then having a date entry in the user field called 'User Leave Date'. A blank entry in that field means a user is not deemed to have left (although the user's account may still currently be set to 'not enabled' and vice versa).

In-built query-level data restrictions:
- The 'User Group Code' data item is set to All Users

Up-front prompts:
- The report runs without any up-front prompts

Input Controls:
- The report does not contain any document-level input controls

Report tabs:
- Summary
- Enabled users not logged in
- Not enabled users not logged in
- Users that have left
- Datasheet

Usage tips:
This is a report which is not run very often by customers. It is most commonly-used to look at when new starters have yet to log into the system to begin mandatory learning assignments.

Learn Report Title: Course Summary

Report Purpose:
This report looks at learning completion at course level (regardless of how many lessons make up a course). A user will be deemed to have a status of ‘complete’ for a course if they have done all the lessons in that course. The report summary page highlights how many users appear in the report, how many course assignments are complete, how many course assignments are incomplete (started but not yet complete) and how many course assignments are not started. The Top Ten courses by number of completions recorded is shown as a supplementary chart.

In-built query-level data restrictions:

- The report will only return data for enabled users
- The report will only return data for enabled courses

Up-front prompts:

- Choose a start date for Course Updated Date (last 30 days is pre-selected)
- Choose an end date for Course Updated Date (last 30 days is pre-selected)
- User Group Code (‘All Users’ is pre-selected)
- Course Assigned? (‘Yes’ is pre-selected)
- Course Category
- Course Code
- Mandatory Course?

Input Controls:

- The report does not contain any document-level input controls

Report tabs:

- Summary page
- Course summary
- Users by course
- Courses by user
- Datasheet

Usage tips:
This report is useful for looking at courses which are not mandatory (i.e. they have been self-selected by the user). It is important to understand that this report does not take into account any repeat training requirements that you have assigned to lessons. Repeat training is triggered via the user of an accreditation. The Course Summary report does not look at accreditation data. This means someone who has originally completed a lesson will still display as compliant for that lesson in the Course Summary report even if their deadline for repeating the lesson has been breached. If you wish to report on courses with repeat training, we recommend the Course Compliance report.

Learn Report Title: Training Status: All Training

Report Purpose:
This report provides a datasheet-style output based on the parameters you choose when the prompts window first appears. We recommend that you always make selections using the prompts, rather than run this report for all data/time ranges. The report covers both mandatory and non-mandatory (elective) course assignments. Use it to get granular lesson-level information, but always have in the back of your mind the understanding that it does not take into account any repeat training requirements that may be part of your lesson/accreditation configuration on Learn.

In-built query-level data restrictions:

- The report will only return data for enabled users
- The report will only return data for enabled courses
- The report will only return data for enabled lessons

Up-front prompts:

- Choose a start date for Lesson Updated Date (last 30 days is pre-selected)
- Choose an end date for Lesson Updated Date (last 30 days is pre-selected)
- User Group Code ('All users' is pre-selected)
- Course Assigned? ('Yes' is pre-selected)
- Mandatory Course?
- Course Code
- Lesson Code
- Lesson Type
- Lesson Status (Latest)

Input Controls:

- Slice by Primary User Group
- Slice by LMS Full Name
- Slice by Lesson Type
- Slice by Course Title
- Slice by Lesson Title
- Slice by Lesson Status (Latest)

Report tabs:

- Training record
- Training record by user
- Training record by course

Usage tips:
This report does not take into account any repeat training requirements that you have assigned to lessons. What this means is that someone who has originally completed a lesson will still display as compliant for it in the report even if the expiry date for repeating the lesson

has been breached. Only use the Training Status: All Training report for producing data about courses/lesson which do not have a repeat cycle associated with them. If you wish to report on lessons with repeat training, we recommend the Course Compliance report.

Learn Report Title: SCORM Detail

Report Purpose:

This report is built specifically for SCORM 2004 e-learning content. Unlike SCORM 1.2 content, the 2004 version allows question-level analysis of not just who got questions right or wrong, but which incorrect answers they chose, etc. For the report to return data, the content you are using must fully conform to the SCORM 2004 standard.

In-built query-level data restrictions:

- The report will only return data for enabled lessons

Up-front prompts:

- Choose a start date for SCORM Test Date and Time (all dates are pre-selected)
- Choose an end date for SCORM Test Date and Time (all dates are pre-selected)
- Enabled User ('Yes' is pre-selected)
- Primary User Group
- SCORM Course Code
- SCORM Lesson Code

Input Controls:

- The report does not contain any document-level input controls

Report tabs:

- SCORM summary
- SCORM summary by lesson
- SCORM complete users
- SCORM incomplete users
- SCORM failed users
- SCORM question summary
- Datasheet

Usage tips:

The report allows you to look at overall completion of any compatible SCORM 2004 lesson, with the option to then drill down to question-level response analysis. Seeing a question which has been answered incorrectly, or how often it has been answered incorrectly, might pinpoint a very specific knowledge gap among your users. You also have the option to gauge whether questions themselves might be misleading your users if the question is badly worded. For example, you may have a multiple-choice question for which an unusually large number of people are answering incorrectly. Rather than assume there is a knowledge gap, perhaps the question or the possible answers are misleading? SCORM 2004 question-level analysis allows you to investigate this.

Learn Report Title: Users With No Course Enrolments

Report Purpose:
This report very much does what it says on the tin. It shows users who do not have any courses assigned to them. It also shows whether the user(s) returned in the report are enabled or not enabled.

In-built query-level data restrictions:
- The number of lessons assigned to a user is equal to 0

Up-front prompts:
- User Group Code ('All Users' is pre-selected)
- Enabled User ('Yes' is pre-selected)
- Primary User Group
- Primary Job Profile
- LMS Role

Input Controls:
- The report does not contain any document-level input controls

Report tabs:
- Users with no course enrolments
- Datasheet

Usage tips:
Not a report that you are likely to use very often. A typical scenario when you may use it is to check whether new starters have yet to have courses assigned to them. The datasheet contains the User Start Date object so you can easily scan for recent dates.

Learn Report Title: Online Access (User/Group/Lesson)

Report Purpose:
This report summarises usage levels for online content. It excluded instructor-led lessons. It offers a top-level view (looking by user or by lesson) as to how many times that content has been accessed for the date range period that you select when the up-front prompts window appears.

In-built query-level data restrictions:
- Lesson Type is one of the following: Kallidus; Engage; SCORM; SCORM 2004; AICC; URL

Up-front prompts:
- Choose a start date for Lesson Updated Date (last 30 days is pre-selected)
- Choose an end date for Lesson Updated Date (last 30 days is pre-selected)
- User Group Code ('All Users' is pre-selected)
- Lesson Code
- Lesson Status (Latest)
- Lesson Status (Best)
- Lesson Enabled? ('Yes' is pre-selected)
- Enabled User? ('Yes' is pre-selected)

Input Controls:
- The report does not contain any document-level input controls

Report tabs:
- User online access
- Lesson online access
- Datasheet

Usage tips:
The way to use this report is to be very specific when the up-front prompts window appears. For example, let's assume that you released two new e-learning modules at the beginning of last month and you want to get an idea of how often they are being used. In the prompts window you can easily specify the date range that you wish to look at, then select the two Lesson Codes in which you are interested. There's nothing to stop you running the report across all lessons, but it is often more manageable if you are a bit more selective when running the report. The 'Lesson Enabled?' prompt is pre-selected to 'Yes', but if you want to hunt for usage data on a lesson which is no longer enabled, simply switch that 'Yes' to 'No'.

Learn Report Title: User Training Time

Report Purpose:
This is a seldom-used report. It looks at the event 'Administrator' field against an instructor-led event and the duration of the event (e.g. one hour). The report deems the event administrator to be the person who delivered the training. Consequently, for each user on the system who has a minimum of one entry as an administrator for an event, their total training delivery time is aggregated. Note that only one event administrator can be selected in the Learn administration interface for an event. This means that data for more than one trainer cannot be tracked for an individual event.

In-built query-level data restrictions:

- The report will only return data for enabled users
- Total Training Duration (Seconds) is greater than 0

Up-front prompts:

- Choose a start date for User Training Time Date (all dates are pre-selected)
- Choose an end date for User Training Time Date (all dates are pre-selected)
- Primary Job Profile
- Primary User Group
- LMS Role

Input Controls:

- The report does not contain any document-level input controls

Report tabs:

- User training time

Usage tips:
Only use this report if you have reliable and accurate data held in the event administrator field for your events. Some organisations using Kallidus Learn prefer to use the 'event resources' functionality in Learn to manage trainer assignments. This is data which is also reportable. See the reports entitled 'Resource Planner (Monthly)', Resource Planner (Yearly), 'Resource Bookings' and 'Resource Utilisation' if you have opted to use the event resources functionality for trainer booking management.

Learn Report Title: Staff Turnover

Report Purpose:
This report looks at the data fields entitled ‘User Start Date’ and ‘User Leave Date’ to establish the level of turnover that the system has seen for the date range period that you select via the up-front prompts window. In addition to an overall summary page showing number of starters, number of leavers and overall staff turnover percentage there are tabs listing all starters and all leavers. The main summary page also contains charts showing the top ten starters and top ten leavers by job profile.

In-built query-level data restrictions:
- No restrictions at query level

Up-front prompts:
- Choose a start date for User Start Date (last 30 days is pre-selected)
- Choose an end date for User Leave Date (last 30 days is pre-selected)

Input Controls:
- The report does not contain any document-level input controls

Report tabs:
- Summary
- Starters
- Leavers

Usage tips:
One thing to bear in mind with this report is that it can only contain people in your organisation who have a user account on Learn. This means that if you have separate staff turnover metrics being provided via your HRIS or payroll system, the metrics from that may differ from the metrics supplied by the Learn report if some of the people at your organisation are not on Learn.

Learn Report Title: CPD Activity

Report Purpose:
This report looks at CPD (Continuing Professional Development). It shows how many CPD assignments are in place across all of the different CPD Programmes that exist on your system. Dashboard numbers tell how many assignments are achieved and not achieved. Charts also show a programme-by-programme breakdown. The more detailed data tabs (listed below) show increasingly granular levels of detail. The report contains breakdowns of accredited and non-accredited CPD.

In-built query-level data restrictions:

- The report will only return data for enabled users

Up-front prompts:

- CPD Programme Professional Body
- CPD Programme
- CPD Period Start Date
- Primary User Group
- Primary Job Profile

Input Controls:

- The report does not contain any document-level input controls

Report tabs:

- Summary
- Summary by programme title
- CPD targets achieved
- CPD targets not achieved
- No CPD activity
- Datasheet

Usage tips:
As with several standard reports in Learn, the up-front prompts window is useful for being precise about which CPD Programmes and CPD Periods you want to report on. Note that the report will automatically display whether you are using CPD units of hours or points for each CPD Period that you have created.

Learn Report Title: User Statistics

Report Purpose:
This is a 'housekeeping' type of report. It is one you are unlikely to use very often. The four report tabs display information about different areas of the system. It contains information about user distribution across the different LMS Roles (including any custom LMS Roles that you have created on the system), how many members each Primary User Group contains (enabled users only), how many users are assigned to each course and how many users are assigned to each branding theme.

In-built query-level data restrictions:
- The report will only return data for enabled users
- The report will only return data for enabled courses

Up-front prompts:
- LMS Role
- Theme
- Primary Job Profile
- Course Code

Input Controls:
- The report does not contain any document-level input controls

Report tabs:
- Roles
- Primary user group
- Courses
- Themes

Usage tips:
Run the report if you need to get some basic information about LMS Roles, Primary User Groups, Course assignment volumes or branding themes. The report does not contain any learning-related data so do not try to use it for any kind of course or lesson completion analytics.

Learn Report Title: Monthly Statistics

Report Purpose:
This report gives you a broad-brush picture or learning and login activity for the previous full calendar month. Adjusting the up-front prompts date range selections will allow you to widen or narrow down the period of time for which you are looking. The report summarises key metrics such as how many users have logged training activity, the number of e-learning launches, total lesson completions, top 15 e-learning lessons by completion, top 15 instructor-led lessons by completion and more. Other tabs show login data by day and time band.

In-built query-level data restrictions:

- The report will only return data for enabled users

Up-front prompts:

- Choose a start date for the report ('Previous month' is pre-selected)
- Choose an end date for the report ('Previous month' is pre-selected)

Input Controls:

- The report does not contain any document-level input controls

Report tabs:

- Monthly statistics
- Top 15 completion details
- Monthly logins
- Logins by day and time band

Usage tips:
The report is designed to summarise data so it's not suitable for granular reporting. It will show you how many lessons completions have been logged but will not drill down into the user-level detail of who has done what. Other reports such as the Course Compliance report, the Course Summary report and the Training Status: All Training report are more suitable for that.

Learn Report Title: User Imports

Report Purpose:
This report used to identify issues with people data in the automated data feed, including; duplicate usernames/import keys invalid email addresses. If issues are identified, the issues can be corrected at source, ready for the next time the data feed runs.

In-built query-level data restrictions:
- No restrictions at query level

Up-front prompts:
- This report runs without any up-front prompts

Input Controls:
- The report does not contain any document-level input controls

Report tabs:
- Import summary
- Import exceptions

Usage tips:
This report will only ever show data for the last time the datafeed ran. We recommend that you schedule this report to arrive in your inbox every day and make it part of your daily admin routine to check for issues.

Learn Report Title: Accreditations Detail Report

Report Purpose:

Accreditations in Learn serve two purposes. The most common is to act as the mechanism by which repeat training is set up. A lesson will have an accreditation associated with it if you require learners to periodically re-take the lesson. If a user fails to re-take a lesson, their Accreditation Status will show as ‘expired’ once the repeat training date has passed. Accreditations might also be used to show that someone has gained a qualification (typically an external qualification). Accreditations can be set to expire (such as the example above when you need a learner to periodically repeat the lesson associated with it) or can be set to be held forever without any future expiry date in place. The Accreditations Detail report will show what you need to know about your accreditations – how many are assigned, how many are complete, how many are still waiting to be done, how many are suspended and how many have expired.

In-built query-level data restrictions:

- The report will only return data for enabled users
- The report will only return data for enabled accreditations

Up-front prompts:

- Choose a start date for Accreditation Expiry Date (all dates are pre-selected)
- Choose an end date for Accreditation Expiry Date (all dates are pre-selected)
- Accreditation Code
- Accreditation Category

Input Controls:

- Slice by Accreditation Title

Report tabs:

- Summary
- Expired accreditations
- Due to expire in less than 90 days
- Datasheet

Usage tips:

Digging into the detail of your accreditations is the key to getting the most from this report. Use the up-front prompts to narrow down the search if you need information about specific accreditations. Or take a look at how many accreditations are due to expire over the next 90 days. A useful addition to the ‘Datasheet’ tab is a column on the far right of the table called ‘Next booked date’. This shows (for instructor-led lessons only) whether a user has a future booking in place for an event that is associated with a lesson that must be repeated. So, for example, a user may already be expired for an accreditation, or be approaching the expiry date, but they have an event booking which (assuming they attend the event) will lead to them regaining/retaining their accreditation. Knowing who has and does not have an event booking can be a useful insight.

Learn Report Title: Accreditation Trajectory

Report Purpose:

For an overview of what purpose an accreditation serves in Learn, take a look at the description of the Accreditations Detail report (above). The way the Accreditation Trajectory report differs from the Accreditations Detail report is the focus that is places on looking forward. It will show for the next 12 months how many accreditations are currently held and how many are due to expire. It also displays under the 'Due Now' column any accreditations which have either expired or have been assigned to a user but not yet been gained. The report is designed to allow you to do some planning about what may be needed to keep your learners 'in date' with their accreditations.

In-built query-level data restrictions:

- Users must be assigned to an accreditation as a result of a group assignment (as opposed to the being assigned to it individually) or the accreditation must be a fixed accreditation rather than a continuous accreditation

Up-front prompts:

- Accreditation Category
- Accreditation Code
- Accreditation Title
- User Group Category
- User Group Code
- User Group Title
- Enabled User
- Enabled Accreditation

Input Controls:

- Slice by Accreditation Title
- Slice by Primary User Group
- Slice by Primary Job Profile

Report tabs:

- Accreditation trajectory
- View by person
- View by accreditation title

Usage tips:

Use the report to look for spikes in future repeat training requirements, particularly if that will mean the need to schedule instructor-led events. Also use it to see who has yet to complete an accreditation or who has gone beyond an accreditation expiry date. The column called 'Days until/since expiry' will help with this.

Learn Report Title: All Courses

Report Purpose:
This report is great for your system housekeeping. It shows you information such as how many courses you have on the system, how many are enabled/not enabled, how many do not contain any lessons, how many are not assigned to any users, etc.

In-built query-level data restrictions:
- No restrictions at query level

Up-front prompts:
- This report runs without any up-front prompts

Input Controls:
- Slice by Course Category
- Slice by Course Title
- Slice by Course Enabled?

Report tabs:
- Summary
- Courses not enabled
- Courses with no users
- Courses with no lessons
- Datasheet

Usage tips:
Use this report to keep your courses spick and span. You may want to get rid of courses which contain no lessons, for example. The report is also handy for looking at whether elective courses are proving popular or not. You can assess this by looking at the tab called 'Courses with no users' and scouring the data for enabled courses which no one has chosen to do. On the 'Datasheet' tab you'll find additional metrics such as the average course rating which has been given by users who have completed courses. The report does not contain any user-level learning-related data so do not try to use it for seeing who has completed what. Instead, use it for overall analysis of your course library.

Take care not to delete a course just because it is set to not enabled. There may be a reason that a course has that configuration. Remember that deleting courses and lessons will also delete the learning completion history associated with them. If you do ever select 'delete' for a course or a lesson within the administration screens, you'll be prompted to confirm that your action to delete it is intentional. But once you pull the trigger, the deletion is irreversible.

Learn Report Title: All Lessons/Course Contents

Report Purpose:
Like the All Courses report, this report is useful for your system housekeeping. It shows you information such as how many lessons you have on the system, how many are enabled/not enabled, how many do not sit within a course, how many are not assigned to any users, etc. Remember that any lesson which does not sit within a course will never be visible to your users.

In-built query-level data restrictions:
- No restrictions at query level

Up-front prompts:
- This report runs without any up-front prompts

Input Controls:
- Slice by Lesson Category
- Slice by Lesson Type
- Slice by Lesson Enabled?

Report tabs:
- Summary
- Not enabled lessons
- Lessons with no users assigned
- Lessons not assigned to courses
- Datasheet

Usage tips:
This is another report that's useful for system housekeeping. You may want to get rid of lessons which are not assigned to a course, for example. Or you might use it to investigate why some lessons have no users associated with them.

Take care not to delete a lesson just because it is set to not enabled. There may be a reason that a lesson has that configuration. Remember that deleting courses and lessons will also delete the learning completion history associated with them. If you do ever select 'delete' for a course or a lesson within the administration screens, you'll be prompted to confirm that your action to delete it is intentional. But once you pull the trigger, the deletion is irreversible.

Learn Report Title: Course Evaluation Summary

Report Purpose:
This report looks at evaluation data for your courses. Note that there are separate evaluation reports for lessons and for events. Note also that Learn supports both 'initial' and 'follow-up' evaluations. The reports take account of whether an evaluation response is from an initial or a follow-up request. The main summary page of the Course Evaluation Summary report looks at how many users have been asked to provide an evaluation and how many have done so. It also gives high-level information about NPS (Net Promoter Score) and ratings (based on a 1 to 5 scale). The up-front prompts allow you to down-select by course start date range, by course, by event and by which evaluation form(s) you are interested in seeing.

In-built query-level data restrictions:
- The report will only return data for enabled courses

Up-front prompts:
- Choose a start date for Course Start Date (all dates are pre-selected)
- Choose an end date for Course Start Date (all dates are pre-selected)
- Course Code
- Course Evaluation Title

Input Controls:
- Slice by Evaluation Form Title
- Slice by Course Title

Report tabs:
- Course evaluation summary
- By course
- By evaluation form
- Datasheet

Usage tips:
Remember when using the Course Evaluation Summary report that the dashboard/summary view (the one which first appears when the report opens) has at its heart the concepts of NPS (Net Promoter Score) and event ratings (on a 1 to 5 scale). These are both questions which appear in the Recommended Evaluation Form that ships with Kallidus Learn. If you have created your own evaluation forms which do not contain an NPS or a 1-5 rating in them, some of the metrics on the dashboard will be fairly meaningless if you choose to report on just your own evaluation forms. But don't forget that the overall numbers for evaluations requested, evaluations completed and so on will still be relevant. And so will the information in the other tabs contained in the report. You can still do a variety of things when evaluating your own evaluation forms. Be sure to make good use of the up-front prompts and the input controls when delving into your data.

Learn Report Title: Lesson Evaluation Summary

Report Purpose:
This report looks at evaluation data for your lessons. Note that there are separate evaluation reports for courses and for events. Note also that Learn supports both 'initial' and 'follow-up' evaluations. The reports take account of whether an evaluation response is from an initial or a follow-up request. The main summary page of the Lesson Evaluation Summary report looks at how many users have been asked to provide an evaluation and how many have done so. It also gives high-level information about NPS (Net Promoter Score) and ratings (based on a 1 to 5 scale). The up-front prompts allow you to down-select by course start date range, by course, by event and by which evaluation form(s) you are interested in seeing.

In-built query-level data restrictions:
- The report will only return data for enabled lessons

Up-front prompts:
- Choose a start date for Lesson Start Date (all dates are pre-selected)
- Choose an end date for Lesson Start Date (all dates are pre-selected)
- Lesson Code
- Lesson Evaluation Title

Input Controls:
- Slice by Evaluation Form Title
- Slice by Lesson Title

Report tabs:
- Lesson evaluation summary
- By lesson
- By evaluation form
- Datasheet

Usage tips:
Remember when using the Lesson Evaluation Summary report that the dashboard/summary view (the one which first appears when the report opens) has at its heart the concepts of NPS (Net Promoter Score) and event ratings (on a 1 to 5 scale). These are both questions which appear in the Recommended Evaluation Form that ships with Kallidus Learn. If you have created your own evaluation forms which do not contain an NPS or a 1-5 rating in them, some of the metrics on the dashboard will be fairly meaningless if you choose to report on just your own evaluation forms. But don't forget that the overall numbers for evaluations requested, evaluations completed and so on will still be relevant. And so will the information in the other tabs contained in the report. You can still do a variety of things when evaluating your own evaluation forms. Be sure to make good use of the up-front prompts and the input controls when delving into your data.

Learn Report Title: Course Compliance

Report Purpose:
Of all the standard reports across Learn, the Course Compliance report is possibly the most important to understand. In short, this report shows you how many mandatory course assignments are compliant and how many mandatory course assignments are not compliant. Of crucial importance is the fact that this report takes account of repeat training. That contrasts with the Course Summary report which you may have also used. The Course Compliance report will not just determine if someone has previously completed a lesson. It will also scour the database to see if a user must periodically repeat the lesson. If they must – and if they missed the deadline to do so – the user will now be deemed to be not compliant for the lesson and for the course in which that lesson sits. This repeat training check is crucially important if you are using accreditations to power the repeat training cycle for some of your learning.

In-built query-level data restrictions:
- The report will only return data for mandatory course assignments
- The report will only return data for enabled courses
- The report will only return data for enabled users
- The report will only return data for users to whom the course is currently assigned
- The report will only return data for enabled accreditations (an accreditation is the mechanism used in Learn to signify that a user must periodically repeat a lesson)
- Note that this report contains two queries rather than just one. This is important to know if you save a version of the Course Compliance report and then make query-level edits

Up-front prompts:
- Course Category
- Course Title

Input Controls:
- Slice by Course Title

Report tabs:
- Overall compliance
- Compliance by course
- Details
- Non-compliant users
- Compliant users

Usage tips:
The key thing to remember with the Course Compliance report is that it is built to only show mandatory course assignments (irrespective of whether they may or may not have to be periodically repeated). A mandatory course is one which has either (a) been assigned to a

user courtesy of that user being a member of group to which the course is linked or (b) has been directly assigned to the user by an administrator. It does not include self-selected (elective) course assignments. The report shows overall course compliance. It does not directly display user compliance (i.e. what percentage of mandatory courses has each user completed and remains in date for).

If you decide to go into 'Design' mode to edit this report, please note that it is based on two underyling queries rather than one. This is an important aspect of the report's design and can lead to unexpected problems if editing is done by someone not familiar with dual-query reports. If in doubt, have a word with our Support Team if you think you need to make edits to this report.

Learn Report Title: Reflections Course Summary

Report Purpose:

This report analyses how often your users have recorded reflections. It includes standard reflections and SRA (Solicitors Regulatory Authority) reflections. You will be able to see what proportion of your user base has logged reflections on the system.

In-built query-level data restrictions:

- Users must have at least one course that is complete for them to appear in the report

Up-front prompts:

- Choose a start date for Reflection Date (all dates are pre-selected)
- Choose an end date for Reflection Date (all dates are pre-selected)
- Reflection Title
- Reflection Course Title
- Reflection Course Enabled?

Input Controls:

- The report does not contain any document-level input controls

Report tabs:

- Reflection course summary
- Reflections by course
- Datasheet

Usage tips:

If you want to see the detailed responses from your users, head to the 'Datasheet' tab within the report. This will display what questions they were asked and what answers they provided. It will also show the course about which they were responding and the date and time at which their response was logged. This report should not be confused with the Course Evaluation Summary report, although you may choose to look at both when assessment learning reaction to your courses.

Learn Report Title: Reflections Recorded

Report Purpose:

This report is very similar to the Reflections Course Summary report. Unlike that one (which displays a count of users for whom a reflection is possible based upon one or more of the courses assigned to them being complete), this version simply shows the number of users who have submitted a reflection. Importantly, the reflection does not have to be as a result of completing a course on the system. It includes standard reflections and SRA (Solicitors Regulatory Authority) reflections. You will be able to see what proportion of your user base has logged reflections on the system.

In-built query-level data restrictions:

- Users must have submitted at least one reflection to appear in the report

Up-front prompts:

- Choose a start date for Reflection Date (all dates are pre-selected)
- Choose an end date for Reflection Date (all dates are pre-selected)
- Reflection Title
- Reflection Course Title
- Reflection Course Enabled?

Input Controls:

- The report does not contain any document-level input controls

Report tabs:

- Reflections summary
- Reflections by user
- Datasheet

Usage tips:

If you want to see the detailed responses from your users, head to the 'Datasheet' tab within the report. This will display what questions they were asked and what answers they provided. It will also show the course about which they were responding and the date and time at which their response was logged (although for some users the reflection may have been submitted without any link to a course on the system). This report should not be confused with the Course Evaluation Summary report, although you may choose to look at both when assessment learning reaction to your courses.

Learn Report Title: All Event Dates

Report Purpose:
This report takes a detailed look at the instructor-led events which are on your system. Instructor-led can be physical events which take place in a specific location or can be virtual events held online. The report is useful for looking into both the past and the future. It pinpoints things like events with no users, which event locations have been used, how many events are set to not enabled, etc. The summary page includes charts showing which lessons have clocked up the most events and which locations are most commonly used.

In-built query-level data restrictions:
- The report will only return data where the Lesson Type is 'Instructor-led'

Up-front prompts:
- Choose a start date for Event Start Date and Time (all dates are pre-selected)
- Choose an end date for Event Start Date and Time (all dates are pre-selected)

Input Controls:
- Slice by Lesson Title
- Slice by Event Location

Report tabs:
- Summary
- Not enabled events
- Events with no users
- Event locations
- Future events
- Datasheet

Usage tips:
The All Event Dates report does not provide user-level attendance and non-attendance data. If you are looking to report on that, head instead for the Event Attendees report.

Learn Report Title: Event Attendees

Report Purpose:

This report gives you both summary and granular-level detail about who has – and hasn't – attended instructor-led learning. Or for future events, who is due to attend and who may have cancelled their place in the lead-up to it. The report allows you to look both backwards and forwards in time. Instructor-led learning can be physical events which take place in a specific location or can be virtual events held online.

In-built query-level data restrictions:

- The report will only return data where the Lesson Type is 'Instructor-led'
- The report will only return data for enabled users
- The report will only return data for enabled lessons

Up-front prompts:

- Choose a start date for Event Start Date and Time (last 30 days is pre-selected)
- Choose an end date for Event Start Date and Time (last 30 days is pre-selected)
- User Group Code ('All users' is pre-selected)
- Lesson Code
- Event Status

Input Controls:

- Slice by Event Code
- Slice by Event Status
- Slice by Event Location
- Slice by LMS Full Name
- Slice by Lesson Title

Report tabs:

- Event summary
- Event attendees
- Event cancellations
- Datasheet

Usage tips:

The Event Attendees has lots of uses. Run it to find out who has attended events, or pinpoint who the 'no show' serial offenders are. The input controls will be your friend when it comes to doing this. You can easily down-select by Event Status, or by Lesson Title. See how long in advance of an event your users decided to cancel their place – might this explain why some events run at below capacity? A neat trick is to use the report to look back over the past few weeks and see if anyone still has a status of 'booked' – this could mean that someone in your administration team has forgotten up update the status of the people who were scheduled to attend the event. And if you're into cost analysis and attendance charging (something which you can configure in Learn on an event-by-event basis), head to the final few columns on the ‘Datasheet’ tab to see more on those financial metrics for your events.

Learn Report Title: Users With No Event Bookings

Report Purpose:
This report looks at instructor-led lesson assignments and pinpoints any users who do not have a current lesson booking. The report will automatically exclude users who have previously attended an event for that lesson.

In-built query-level data restrictions:
- The Lesson Status (Latest) must be one of the following: Cancelled, Not started, Awaiting Approval, Declined or Waiting List for a user to appear in the report
- The Lesson type must be 'instructor-led for a user to appear in the report

Up-front prompts:
- User Group Code ('All Users' is pre-selected)
- Enabled User? ('Yes' is pre-selected)
- Primary User Group
- Primary Job Profile
- LMS Role
- Theme

Input Controls:
- The report does not contain any document-level input controls

Report tabs:
- Users with no event bookings
- Users by lesson
- Datasheet

Usage tips:
Use the up-front prompts to select the lesson(s) that you're interested in seeing. You'll have a list of users to who the lesson(s) are assigned but who do not currently have a booking. The 'Datasheet' tab will show you the latest lesson status for each user (e.g. 'Cancelled', 'Not started', 'Waiting List', etc.).

Learn Report Title: Training Days

Report Purpose:
This report presents you with a summary of how many training days have been attended for instructor-led lessons. So, for example, if an event is configured as a one-day event and seven people attend it, a total of seven days of training time will be logged. Similarly, if an event is logged as having a duration of 0.5 days and nine people attended the event, the total training time will come in at four-and-a half days. The report provides an event-by-event view and also includes an overall tally for each lesson.

In-built query-level data restrictions:
- The Lesson Type must be 'instructor-led'
- Lesson History Status must be attended, complete or passed

Up-front prompts:
- Choose a start date for Event Start Date (last 30 days is pre-selected)
- Choose an end date for Event Start Date (last 30 days is pre-selected)
- User Group Code ('All Users' is pre-selected)
- Lesson Code
- Lesson Enabled?

Input Controls:
- The report does not contain any document-level input controls

Report tabs:
- Training days
- Datasheet

Usage tips:
The up-front prompts will allow you to be precise about the subjects and the event date ranges that you want to analyse. Note that running the report for future events (ones that still show a status of 'booked' for the people due to attend the events) will not be a meaningful use of this report. Instead, it is designed to look at users who have a status of 'attended', 'complete' or 'passed' for your instructor-led events.

Learn Report Title: Notification List For New Event Dates

Report Purpose:

This report logs who has sent a request to be notified about a new event date. A user makes this type of request when the click the 'Send me new dates' button in Learn. It only applies to instructor-led training.

In-built query-level data restrictions:

- Lesson Type must be 'instructor-led' for users to appear in the report
- Lesson Status (Latest) must be 'requested for users to appear in the report
- The number of lesson requests for a user must be greater than 0

Up-front prompts:

- Choose a start date for Lesson Requested Date and Time (last 30 days is pre-selected)
- Choose an end date for Lesson Requested Date and Time (last 30 days is pre-selected)
- Lesson Code
- Enabled User?

Input Controls:

- The report does not contain any document-level input controls

Report tabs:

- Notification list by lesson
- Datasheet

Usage tips:

Use the up-front prompts to restrict the date range of your report (based upon when the request was submitted), and/or also restrict by Lesson Code so that you limit the amount of information coming back. Note that when you create a new event for an instructor-led lesson in Learn you have the option to choose whether or not to notify users on the notification list. Note too that only users who have a Lesson Status (Latest) of 'requested' will appear in this report. If they have responded to a notification and booked a place on a new event (thus changing their status to 'booked') they will no longer appear on the report.

Learn Report Title: Event Evaluation Summary

Report Purpose:
This report looks at evaluation data for your events. Note that there are separate evaluation reports for lessons and for courses. Note also that Learn supports both 'initial' and 'follow-up' evaluations. The reports take account of whether an evaluation response is from an initial or a follow-up request. The main summary page of the Event Evaluation Summary report looks at how many users have been asked to provide an evaluation and how many have done so. It also gives high-level information about NPS (Net Promoter Score) and ratings (based on a 1 to 5 scale). The up-front prompts allow you to down-select by event start date range, by lesson, by event and even by which evaluation form(s) you are interested in seeing.

In-built query-level data restrictions:
- The Event Evaluation Code must not be null
- The report will only return data for enabled users
- The report will only return data for enabled lessons

Up-front prompts:
- Choose a start date for Event Start Date (all dates are pre-selected)
- Choose an end date for Event Start Date (all dates are pre-selected)
- Lesson Code
- Event Code
- Event Evaluation Title

Input Controls:
- Slice by Evaluation form
- Slice by Lesson Title
- Slice by Event Code

Report tabs:
- Event evaluation summary
- By event
- By evaluation form
- Datasheet

Usage tips:
The trick when using the Event Evaluation Summary report is to remember that the dashboard/summary view (the one which first appears when the report opens) has at its heart the concepts of NPS (Net Promoter Score) and event ratings (on a 1 to 5 scale). These are both questions which appear in the Recommended Evaluation Form that ships with Kallidus Learn. If you have created your own evaluation forms which do not contain an NPS or a 1-5 rating in them, some of the metrics on the dashboard will be fairly meaningless if you choose to report on just your own evaluation forms. But don't forget that the overall numbers for evaluations requested, evaluations completed and so on will still be relevant. And so will the

information in the other tabs contained in the report. You can still do a variety of things when evaluating your own evaluation forms. Be sure to make good use of the up-front prompts and the input controls when delving into your data.

Learn Report Title: Resource Planner (Monthly)

Report Purpose:
This report is not powered by Business Objects. Instead it provides a simple view of the bookings for any system-held resources for the current calendar month. Hover the mouse over a booking to find out more about it.

Usage tips:
Use the report for a quick visual view of any resource bookings. Note that the report opens in the same window, so choose the ‘back’ button to return to the main reports page in Learn.

Learn Report Title: Resource Planner (Yearly)

Report Purpose:
This report is not powered by Business Objects. Instead it provides a simple year-on-year view of the bookings for any system-held resources. Hover the mouse over a booking to find out more about it.

Usage tips:
Use the report for a quick visual view of any resource bookings. Note that the report opens in the same window, so choose the 'back' button to return to the main reports page in Learn.

Learn Report Title: Resource Bookings

Report Purpose:
This report is not powered by Business Objects. Instead it provides a simple view tabular view of the bookings for any system-held resources.

Usage tips:
Use the report for a tabular view of any resource bookings. Note that the report opens in the same window, so choose the ‘back’ button to return to the main reports page in Learn.

Learn Report Title: Resource Utilisation

Report Purpose:

This report summarises resource usage for events. It displays the number of resources that have been used for your events and the number of hours that have been clocked up. If you have configured Learn to map the costs of using those resources, that is also shown in the report.

In-built query-level data restrictions:

- No restrictions at query level

Up-front prompts:

- Choose a start date for Resource Booking Start Date (start of previous year is pre-selected)
- Choose an end date for Resource Booking Start Date (end of current year is pre-selected)
- Resource Category
- Resource Code
- Resource Bookings Category

Input Controls:

- The report does not contain any document-level input controls

Report tabs:

- Summary
- Datasheet

Usage tips:

Use the up-front prompts to down-select by date range and resource cade/category.

Perform Reports

Perform Report Title: Development Activities

Report Purpose:
This report show you a summary of development activities that have been recorded by users. It includes any activities with linked learning.

In-built query-level data restrictions:
- User are not archived
- Development activities are not archived

Up-front prompts:
- Choose a start date for Activity Due Date (all dates are pre-selected)
- Choose an end date for Activity Due Date (all dates are pre-selected)

Input Controls:
- The report does not contain any document-level input controls

Report tabs:
- Summary
- Datasheet

Usage tips:
Use this report to see what development activities have been created by your users, what progress has been made (using a 0% to 100% scale), and what comments have been added. You can also see to which courses on Learn a development activity has been linked (note that linking activities to a course is not mandatory so some development activities will be independent of Learn-hosted courses).

Perform Report Title: Feedback

Report Purpose:

This report contains a summary of the feedback received by your users. It displays a summary of how many feedback requests have been issued, how many responses have been provided, how many individual users have requested feedback and how many individual users have provided feedback.

In-built query-level data restrictions:

- No restrictions at query level

Up-front prompts:

- Choose a start date for Feedback Response Date (all dates are pre-selected)
- Choose an end date for Feedback Response Date (all dates are pre-selected)
- Choose a start date for Feedback Requested Date (all dates are pre-selected)
- Choose an end date for Feedback Requested Date (all dates are pre-selected)
- User is archived? ('No' is pre-selected)
- User Name

Input Controls:

- The report does not contain any document-level input controls

Report tabs:

- Feedback Summary
- Feedback Datasheet

Usage tips:

This report gives you both summary and granular detail about the feedback that is being provided about your people. The up-front prompts are very useful for this report. Not only can you look at a specific date range, you also have the ability to restrict the report to look at individual users. That might be handy in a number of scenarios – from a forthcoming pay review, in preparation for a promotion or even something that might be used during a disciplinary or grievance process.

Perform Report Title: Global Objectives

Report Purpose:
This report provides a summary of your global objectives usage and status. There are additional report tabs to show information by user group, the number of incomplete and overdue objectives, and a future trajectory of when objectives will hit their due date.

In-built query-level data restrictions:
- Objective is not archived
- User is enabled
- User is not archived
- Objective is not archived
- Global objective is not archived
- Global objective is published

Up-front prompts:
- Choose a start date for Objective Due Date (all dates are pre-selected)
- Choose an end date for Objective Due Date (all dates are pre-selected)
- Global Objective Title

Input Controls:
- The report does not contain any document-level input controls

Report tabs:
- Summary
- By Group
- Summary Table by Group
- Overdue
- Incomplete
- Due Date Trajectory

Usage tips:
The main use of this report is to see how often your users and managers link individual performance objectives to the global organisational objectives that you have created. In addition to seeing the level of linkage, you can also get a summary view of the completion status of those objectives.

Perform Report Title: Objectives

Report Purpose:
This report contains a summary of the objectives in your Perform system. It pinpoints the number of users who do and do not have any objectives and who they are. The more granular data tabs give you access to the comments made against individual objectives. There is a detailed datasheet for data exploration and export.

In-built query-level data restrictions:
- Objective is not archived

Up-front prompts:
- Choose a start date for Objective Due Date (all dates are pre-selected)
- Choose an end date for Objective Due Date (all dates are pre-selected)
- Objective Title
- User Name
- User is archived ('No' is pre-selected)
- Job Title

Input Controls:
- The report does not contain any document-level input controls

Report tabs:
- Objectives Summary
- User With No Objectives
- Objectives Comments
- Objectives Datasheet

Usage tips:
This is the report to use if you want to really get into the detail of what objectives your people are being set, how well they are progressing towards them and what comments/narrative are being captured to evidence that progress. The up-front prompts allow macro and micro-level selections to be made. It is easy to pre-filter the report to show data about only one or two users if that's what you need when running it.

Perform Report Title: Reviews

Report Purpose:
This report is likely to be the one you run most often for Perform. It allows you to select specific review templates to get a wide-ranging date-bound picture of how many reviews are in place, how many are complete and incomplete, how many have spilled into being overdue and so on.

In-built query-level data restrictions:

- User is not archived
- Review is not archived

Up-front prompts:

- Choose a start date for Review Due Date (last six months is pre-selected)
- Choose an end date for Review Due Date (last six months is pre-selected)
- Review Template Name

Input Controls:

- Review Template Name

Report tabs:

- Reviews Summary
- User Without a Review
- Reviews
- Review Section Ratings
- Review Comments
- Review Answers/Activities

Usage tips:
This report can quickly contain a lot of data, so the advice is to always be specific with the up-front prompts. Be sure to be precise about the date range that you want to look at, and always consider whether you want to run the report against all of your review templates or only a subset of the full list. It is quite common for organisations using Perform to have different review templates for different business units/areas.

Perform Report Title: Users

Report Purpose:
This report shows you a summary of users in your Perform system. There is a report tab that highlights users with no manager assigned to them – that's a likely sign that any reviews assigned to those users are unlikely to get signed off when they fall due. and a datasheet for filtering and exporting.

In-built query-level data restrictions:
- No restrictions at query level

Up-front prompts:
- Manager User Name
- Job Title
- User is archived?

Input Controls:
- The report does not contain any document-level input controls

Report tabs:
- Summary
- User With No Manager
- Datasheet

Usage tips:
This report is designed primarily to be an administrative aid. By looking at the data you will be able to see who is assigned to which manager and who does not have a manager assignment. The report does not contain information about reviews, objectives, development activities or feedback. Use the other Perform standard reports if you need to see that data.