University of Colorado
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EMPLOYEE SERVICES

Skillsoft Administrator's Reporting Guide

This guide describes running Skillsoft reports. Skillsoft Administrators and users who have been given report-only access can run reports.

List of terms:

- **Username** – a constituent ID (CID). A CID is a unique, universal identifier that comes from Master Data Management (MDM). This ID lets various CU technologies identity and authenticate CU employees and students.
- **HR EmplID** – a six-digit ID number assigned to employees and persons of interest (POIs) at CU in HCM.
- **CS EmplID** – a nine-digit ID number assigned to all students at CU in Campus Solutions.

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Running a Report

In Skillsoft, you use a template to create the report you want to run. Templates are forms that let you determine what dates, filter options, and display options should be included in report results. Skillsoft provides pre-defined templates that you can customize and save as personal templates. You can run reports as needed, or you can schedule them to run automatically.

Running a report in Skillsoft consists of the following tasks that are described in this section:

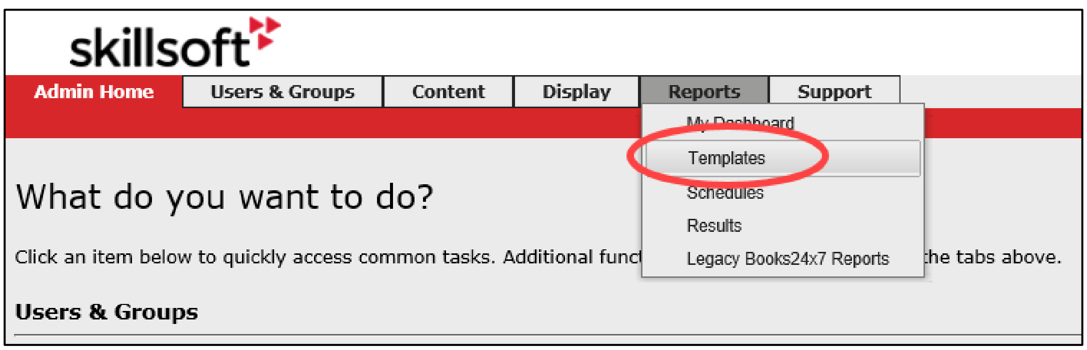
1. Select a template.
2. Specify parameters.
3. Preview the report.
4. Edit and preview again as needed.
5. Save results to a file for download.

Selecting a Template

This following procedure describes running the Detailed by Content report for a user or group (campus or department), by learning asset. This commonly-run report displays usage information of a particular asset, such as a course, by a user or group. It also shows the status of activity, such as in progress, or completed.

To run a Detailed by Content report:

1. Log in to Skillsoft.
2. Under Quick Links, click **Admin**.
3. From the **Reports** menu, select **Templates**.

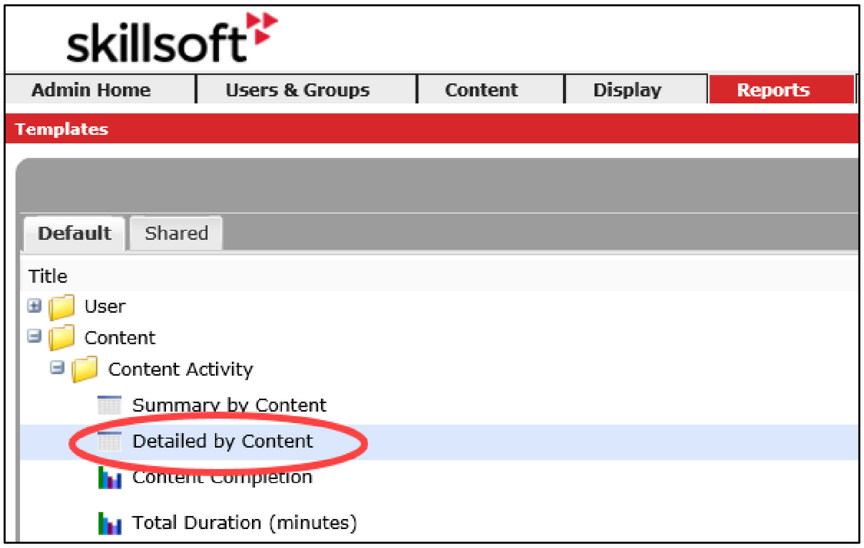


   The Templates page appears with the Default tab displayed.

   Note: the Skillsoft Admin Home menu may have fewer options depending on your security access.

4. Expand **Content**> **Content Activity**.

5. Double-click **Detailed by Content**.



Specifying Report Parameters

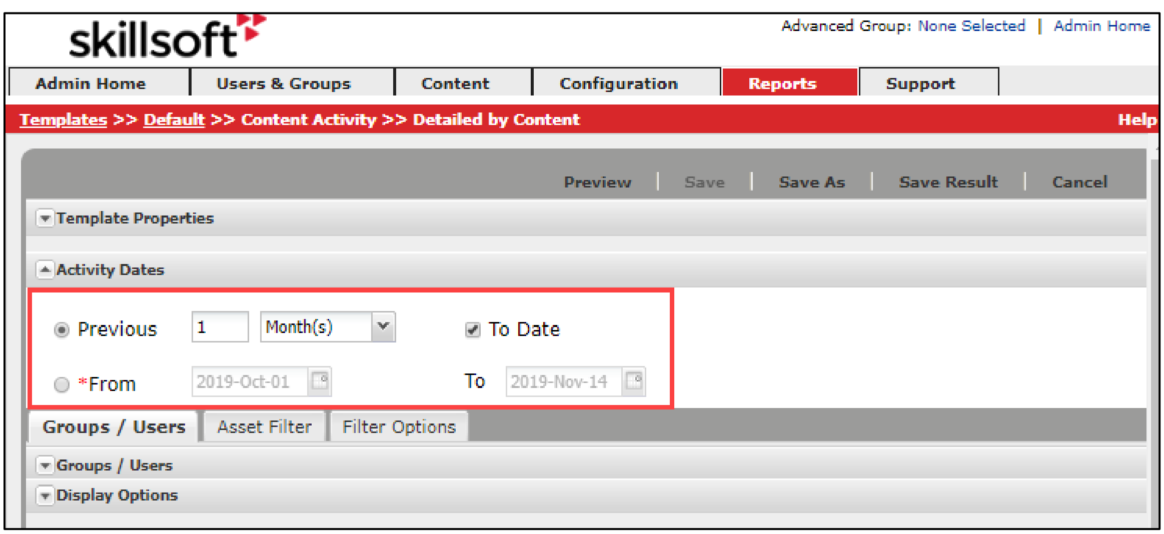
After selecting a template, set parameters and add filters to your report to define the specific output needed.

Note: Report results will include only data of those learners you have permission to view. It's possible to see particular users in a filtering parameter, but not be able to see data for them.

1. After navigating to the **Detailed by Content** report as described in the previous section, enter your date parameters.

   Use one of the following options to specify the date range for your report:

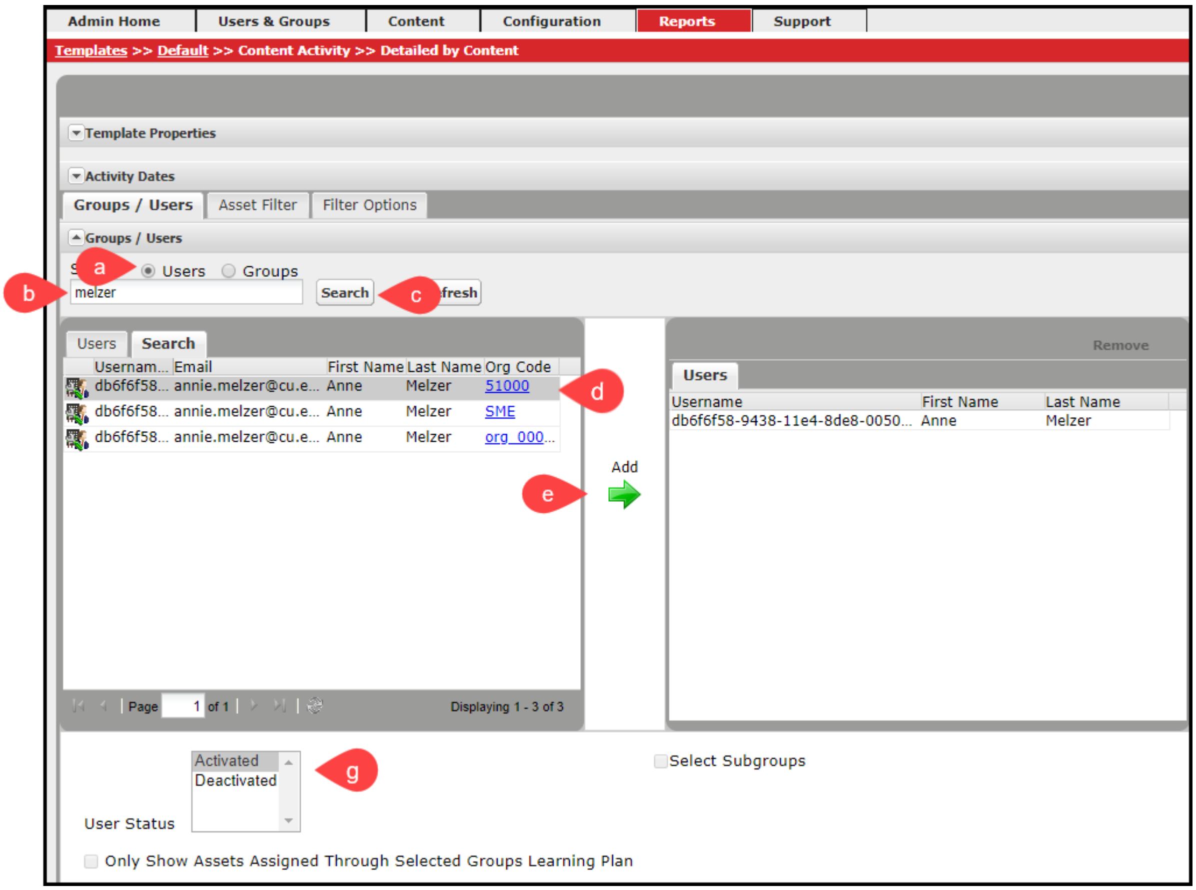
   - **Previous:** Select this option to choose a range of time up to the current date. Type a number in the box, and select a unit of time from the dropdown list, such as Weeks or Months. Leave the **To Date** box selected.
   - **From** and **To:** Select the **From** option, and enter a date range. The first calendar tool lets you specify the beginning of the range, while the second calendar lets you specify the end of the range. Your results will be those records within this range.



2. If you want to run a report for specific users, expand **Groups / Users**. If you want to run a report for a group of users, proceed to step 3.
    a. Select the **Users** radio button.
    b. In the text box, type the email address or last name of the user.
    c. Click **Search**.
    d. Click the user's row in the Search results so it appears highlighted.

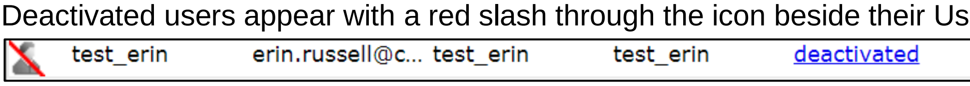
        Note: If a user is listed more than once, check that the Usernames (CIDs) match. If they match, this user has multiple assignments in Skillsoft. Select one row. (Usually the record with a five-digit Org Code for their department, if an employee.) If the Usernames (CIDs) do not match, select both rows for the user and alert system.training@cu.edu of the duplicate accounts. ELD will investigate the duplicate accounts and consolidate them.

    e. Click the **Add** arrow to move your selection to the Users box.
    f. Repeat for additional users.

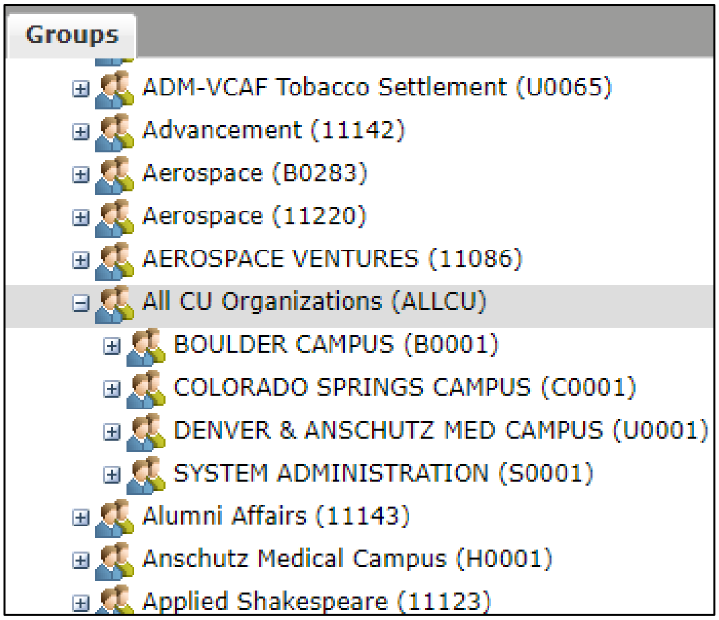


    g. By default, reports include only Active users. If you want to include users that are no longer active, press and hold **Ctrl** while selecting both **Activated** and **Deactivated** from the User Status list.

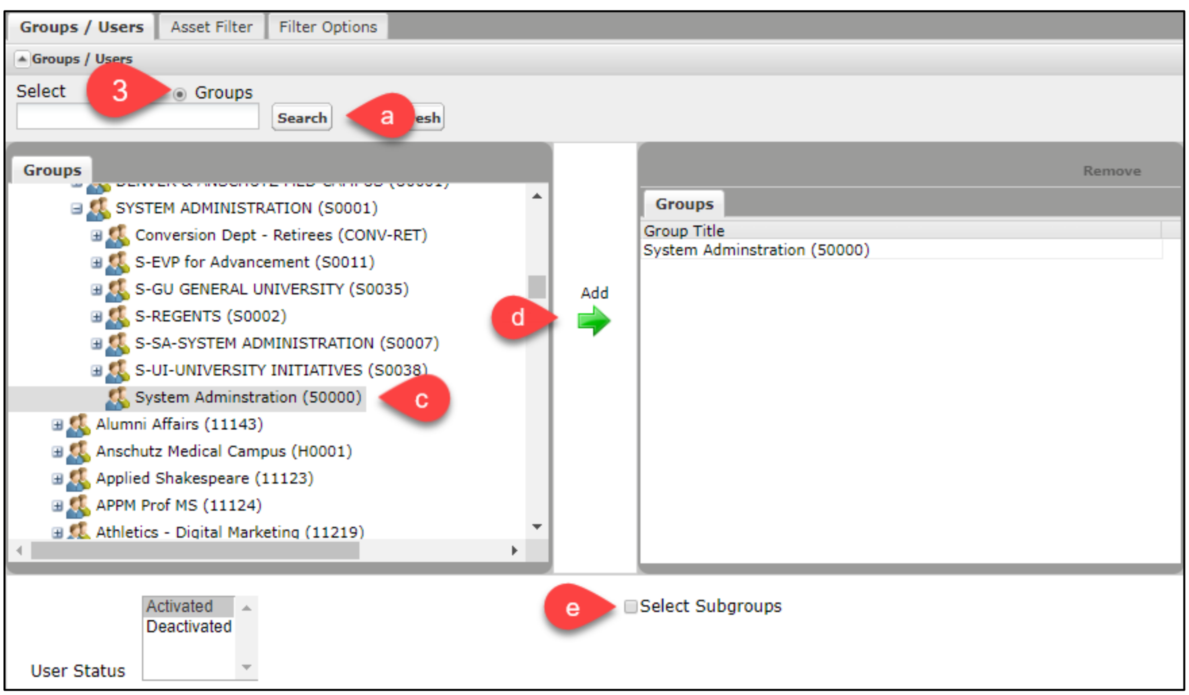
        Note: Deactivated users appear with a red slash through the icon beside their Username.



3. If you want to run a report for a group (department or campus), select the **Groups** radio button.
    a. If you know the department number, type it in the box, click **Search** and continue to step c.
    b. If you don't know the department number:
        i. Expand (click ⊞) **Skillsoft (Skillsoft)**> **All CU Organizations (ALLCU)**.



        ii. Expand the campus.
        iii. Continue expanding folders to drill down to the specific department.
    c. When you see the department you want, click its group row in Search results to highlight it.
    d. Click the **Add** arrow to move the selected group to the Groups box.



   e. Click the **Select Subgroups** checkbox below the Groups box, to include all selected groups and subgroups.
   f. By default, Skillsoft will search for active users. If you want inactive users, click **Deactivated** from the **User Status** list box. If you want both, press **Ctrl** and click **Deactivated** so that both values appear selected.

4. Select the **Asset Filter** tab from which you can specify courses, both online and instructor-led, that the selected users completed. You can use either option listed below. If you want a summary of all the courses taken by the selected users, do not select an asset, and proceed to step 6.
   - Search by Library ID (e.g. _scorm12_cu_s10007_0001; ilt_b10030):
     a. In the **Search** box, type the exact asset title or library ID, and click **Search**.
     b. Select the course so it appears highlighted in the list.
     c. Click the **Add** arrow.
     d. Repeat to add multiple learning assets.
   - Use the Library folders to navigate to a specific course:
     a. Expand **CU Custom Content**.
     b. Expand the campus folder you want.
     c. Select the topic folder you want. (e.g. Finance for "CU: Cash Control" or Instructor Led Training for ILT courses)
     d. Highlight the course.
     e. Click the **Add** arrow.
     f. Repeat to add multiple learning assets.

5. Select the **Filter Options** tab.

   Note: This section is not used often. ELD generally uses this section to select Completed from the Completion Status. You could also choose In Progress, which would show you users who accessed a course but has not yet completed the assessment.

6. Expand **Display Options**, at the bottom of the page:
   a. Select fields to include in the report display, and clear any default fields you do not want.

      Note: From the User Fields section, select the boxes for HR EmplID (for employee ID number), CS EmplID (for student ID number), and Email Address. This will give you users' information that is helpful when investigating issues with Skillsoft training.

Previewing the Report

Previewing lets you see the results of your report before committing it to a particular output or format.

1. Scroll to the top of the page, and click **Preview**.

   Skillsoft runs the report and displays the results.

2. If the results are not what you expect, click **Edit** to update your parameters, and click **Preview** again.
3. Continue modifying parameters until you get the results you need.

   Note: Scroll to the far right of the report to view HR EmplID, CS EmplID, and Email Address.

Saving Template Parameters as a Personal Template

You can save your selected parameters as a personal template.

1. Click **Save Template**.
2. Type a name and description.
3. Click **OK**. A message appears indicating the template has been saved to Personal Templates. It also prompts you to schedule the template.
4. If you want Skillsoft to run your report on a regular schedule, click **Yes**. Otherwise, click No**.**

To use your report template:

1. From the **Reports** menu, select **Templates**.
2. Click the **Personal** tab.
3. Expand **Content**, and select your template.

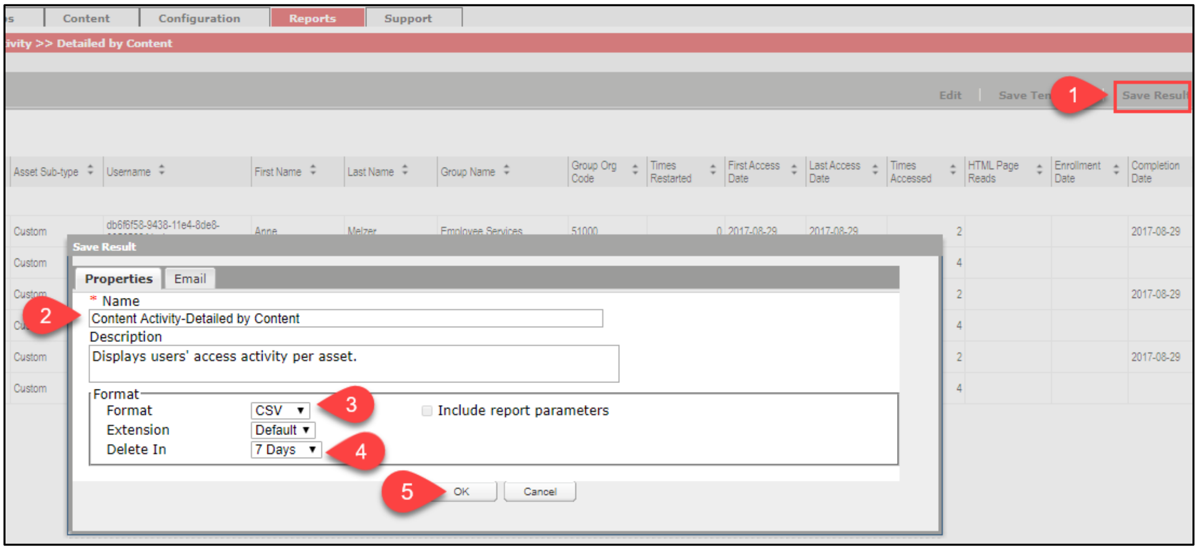
Saving Report Results

To save your report results:

1. Click **Save Result** at the top of the page.
2. In the Save Result window, type a **Name** and **Description** for the report.
3. From the **Format** list, select a file type for your output:
   a. All listed fields will be included in a CSV format.
   b. Excel format requires you to select the **Include report parameters** box to display fields you selected.

      Note: Save the report without the report parameters to simplify the report.

4. Select the number of days after which the report should be deleted from the **Delete In** list.
5. Continue to the following section, *Emailing a Report*, or click **OK** to run the report.



Emailing a Report

To have Skillsoft notify you, or someone else, when your report is ready:

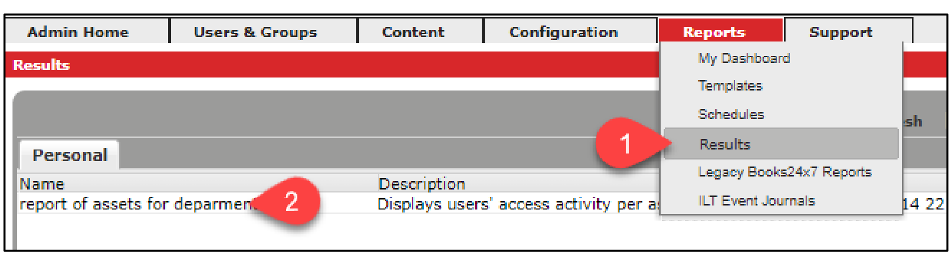
1. From the Save Result window, click the **Email** tab.
2. Click the **Deliver report results to selected Skillport users** checkbox.
3. In the **Search** box, type an email address, and click **Search**.
4. Select the user's row so it appears highlighted.
5. Click the **Add** arrow.
6. Repeat for any additional users.
7. Click **OK** to send the report.

Retrieving Report Results

Reports are ready to view when Completed appears in the status column.

To retrieve your report results:

1. From the Reports menu, click **Results**.
2. Double-click the report name to download the report.



3. Save the report to your computer.

Auditing Skillsoft Course Sessions for Completed Status

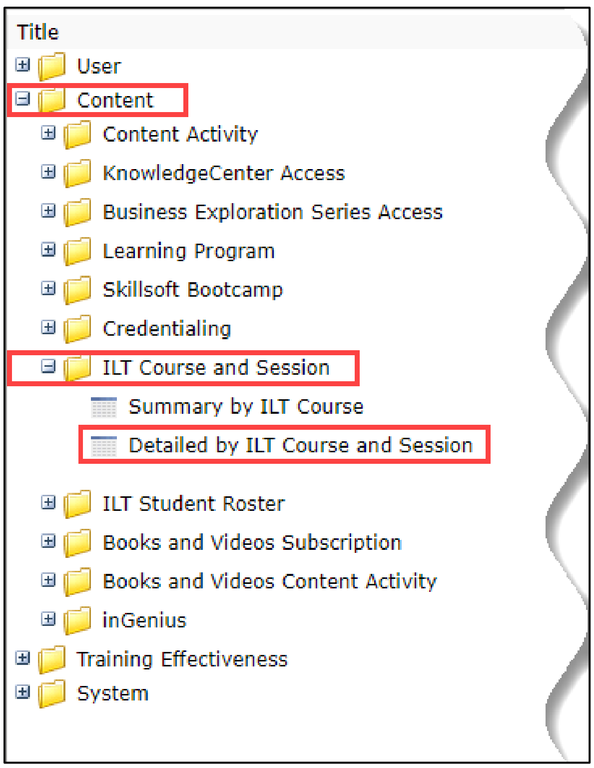
In order for Skillsoft to display session completions in a Learning Transcript, or for it to send completion data to the systems of record (HCM, CIW>CU-SIS), ILT sessions must be marked Complete by a Skillsoft ILT Administrator.

Important: Sessions must be marked complete within 29 days of session's delivery. Skillsoft sends completion data only for those sessions with results entered and updated to Complete. Refer to the *Skillsoft ILT Administrator's Guide* for information about entering results and completing a session.

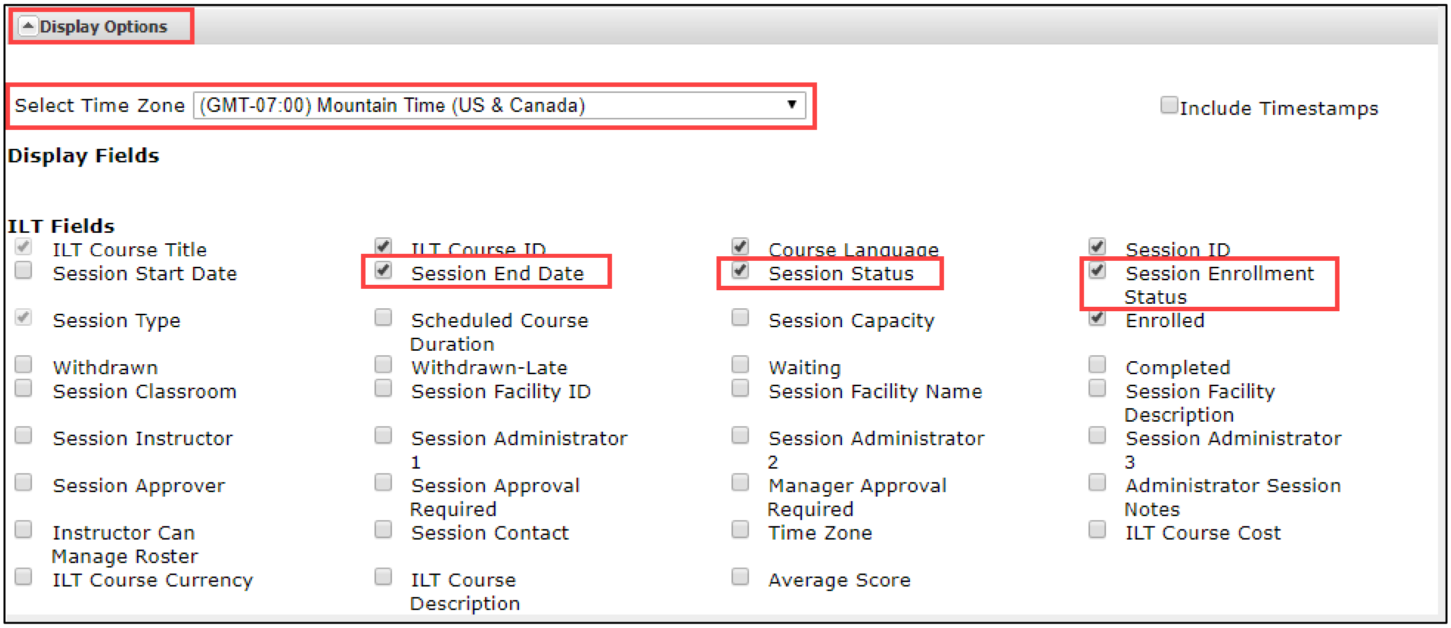
If you manage a number of ILT sessions, you should audit your sessions regularly to make sure you have entered results and marked sessions Complete.

To create a personal template for an ILT session auditing report:

1. From the **Reports** menu, select **Templates**. The Templates page appears with the Default tab displayed.
2. Expand **Content**> **ILT Course and Session**.
3. Double-click **Detailed by ILT Course and Session**.



4. Expand **Display Options**.
5. From the **Select Time Zone** dropdown list, select **(GMT-07:00) Mountain Time (US & Canada)**.
6. From the **ILT Fields** section, select the following checkboxes:
   - **Session End Date**
   - **Session Status**
   - **Session Enrollment Status**
   - Other fields you find useful.



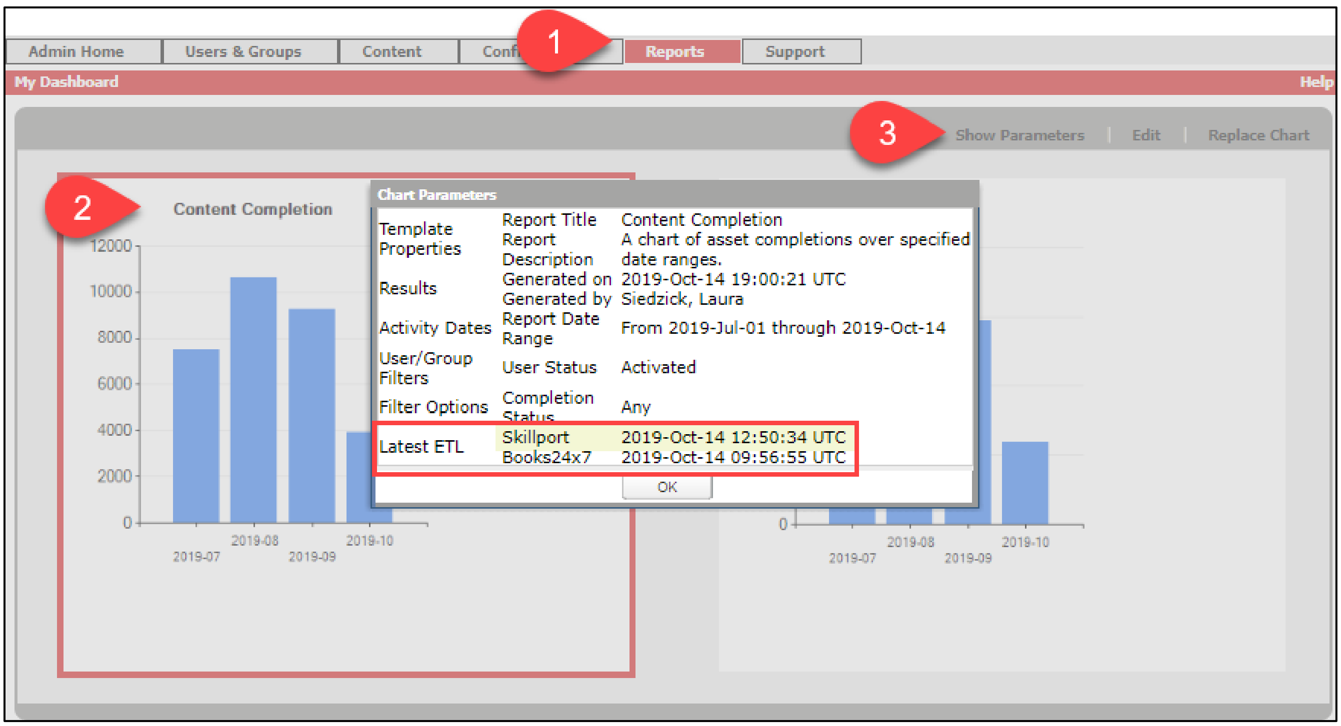
7. Click the **Asset Filter** tab.
8. Under **Library**, expand **Undefined**> **Instructor Led Training**, and select your campus.
9. Select courses you want to audit, and click the **Add** arrow to list them in the selected Asset Title list on the right.
10. From the **Session Status** list, select all status values (Unconfirmed, Confirmed, Completed, and Canceled). You can press and hold the **Ctrl** key while clicking each status.
11. From the **Course Status** list, select **Any**.
12. From the **Session Type** list, select **Physical Classroom**.
13. From the **Session Enrollment** list, select both **Open** and **Closed** using the **Ctrl** key while selecting.
14. Click the **Filter Options** tab.
15. From the **Filter On** dropdown list, select **Session End Date**.
16. With **Previous** option selected, you can indicate the number of months you want to audit up to today's date. Or, you can enter a date range using the **From** option and its related calendars.
17. Click **Preview** at the top of the page. Skillsoft displays the report results. The results should show that your sessions have a Session Status of Completed (or Cancelled). Sessions that have been delivered but not marked as Complete need to be updated before the 29 day deadline.
18. If the results are what you expected, click **Save Result**. If not, edit the parameters and preview again.
19. To use the same report parameters in the future, click **Save Template**.

Finding the Report Update Time (ETL)

Before data can appear in a report, it must go through an ETL (extract, transform, and load) process first. This is the refresh process for the Skillsoft database that updates reports to include all current data. In general, Skillsoft refreshes the database every four to six hours, though it may be as long as 24 hours between ETLs. While Skillsoft refreshes the database frequently, it may be several hours before a completion is reflected in a report. Finding the time of the latest update can help you identify whether completions have or have not been recorded.

To find the latest ETL:

1. From the Reports menu, click **My Dashboard**.
2. Click the **Content Completion** chart.
3. Click **Show Parameters**. The latest ETL is listed at the bottom. The time appears in Coordinated Universal Time (UTC), which is seven hours ahead of Mountain Standard Time (MST), six hours during daylight saving time.



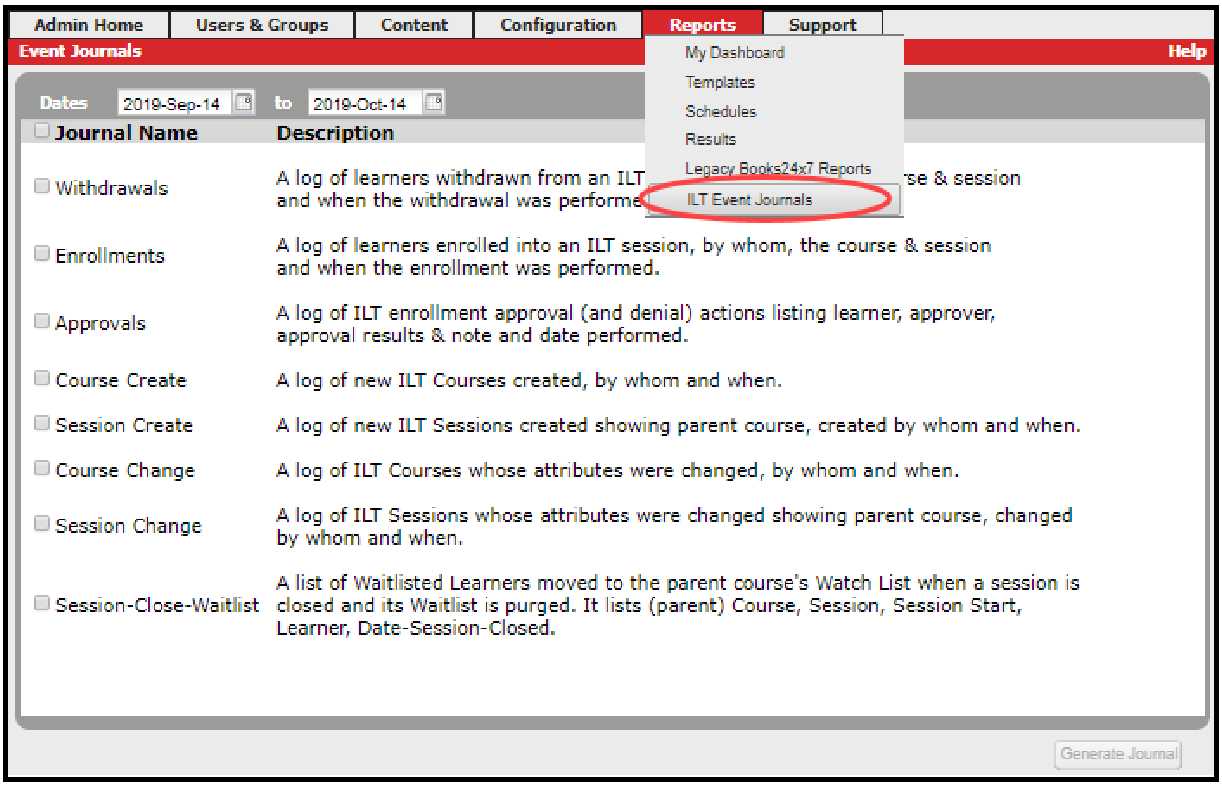
Running an ILT Event Journal

Skillsoft lets you run journals, or reports, of ILT event activity, including information about withdrawals and enrollments for particular course sessions. For example, the Withdrawals journal lists learners who have withdrawn and are no longer visible on the session roster.

Note: When a change is made to a session schedule after the session has been marked complete, Skillsoft reports and journals do not reflect the change.

To run an ILT Event Journal:

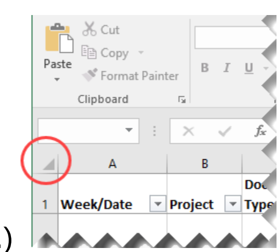
1. From the Reports menu, select **ILT Event Journals**.



2. Specify a date range for the results using the **Dates** (from) and **to** calendars.
3. Select the checkbox next to each report you want. Skillsoft will create a separate .csv file for each journal selected.
4. Click **Generate Journal**. Information for all courses and sessions will be delivered in a .zip file.

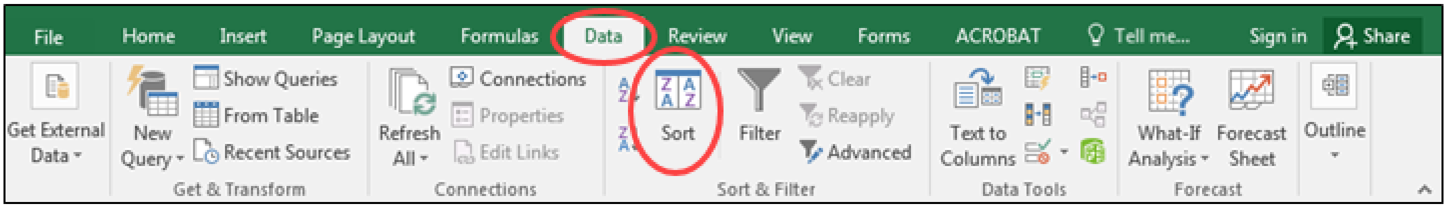
To view and sort your results:

1. Extract the .zip file.
2. Open a .csv file in Excel.



3. Select the entire spreadsheet. (Click the **Select All** button, or press **Ctrl+A**.)

4. From the **Data** tab, click **Sort**.



5. Under Sort by, select either **Session ID** or **Course ID**.
6. Click **OK**.

Other Training Related Completion Reports (CU-Data, HCM)

You can also use the following systems and reports to find course completion data information.

- **CU-Data Employee and Student Completion reports:** The Central Information Warehouse (CIW) is CU's system-wide centralized data repository for information sourced from administrative systems, including Human Capital Management (HCM), Finance (FIN), and CU Student Integrated Systems (CU-SIS). The CU Reporting System, CU-Data (also known as Cognos), is a tool offering standardized reports using data from the CIW. Skillsoft sends training completion information to the CIW through an overnight process. You can run completion reports from the employee portal. HCM access is not required to run this training report. Refer to *Running a Training Completion Report using CU-Data Step-by-Step Guide* for more information.
- **HCM Comprehensive Learning Report:** HCM is the system of record for employee training completions. This report provides training completions (and non-completions) data for all university employees, faculty, university affiliates and persons of interest (POIs). Your HR representative or HCM department user can run this report. You must have HCM security access to Admin Training to run this report. Refer to *HCM Running the Comprehensive Learning Report Step-by-Step Guide* for more information about running this report.