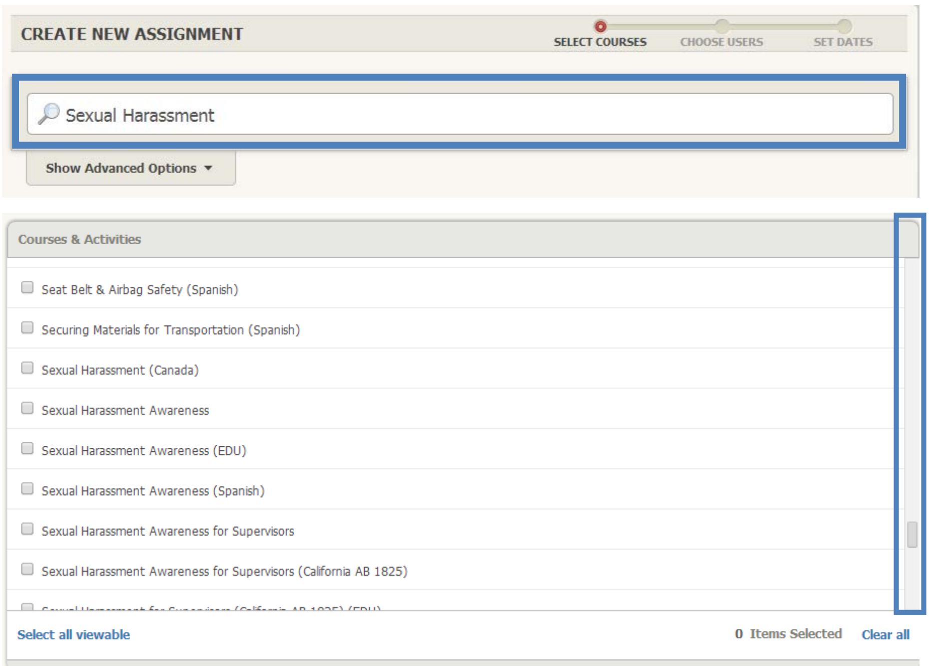
Village of Bloomingdale – Supervisor Guide

How to Create a New Assignment

To access the *Create New Assignments* application, please enter the Administration tab.

To access the various Assignments applications, click on the Assignments drop down menu: Assignments

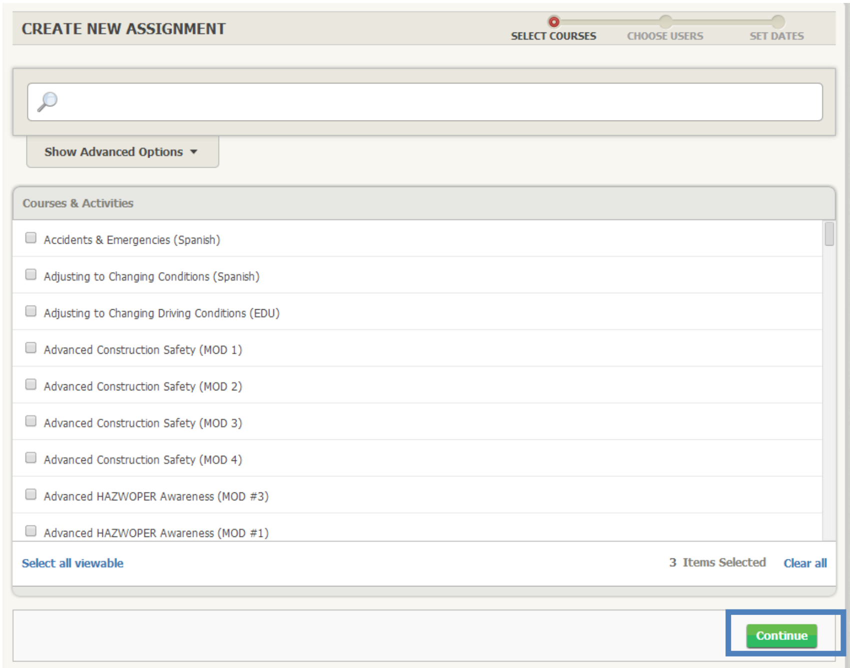
1. Click on Create New Assignments
2. Search for the Course or Activity to be assigned by typing part of the assignment title into the Search Bar or by utilizing the scroll tool:



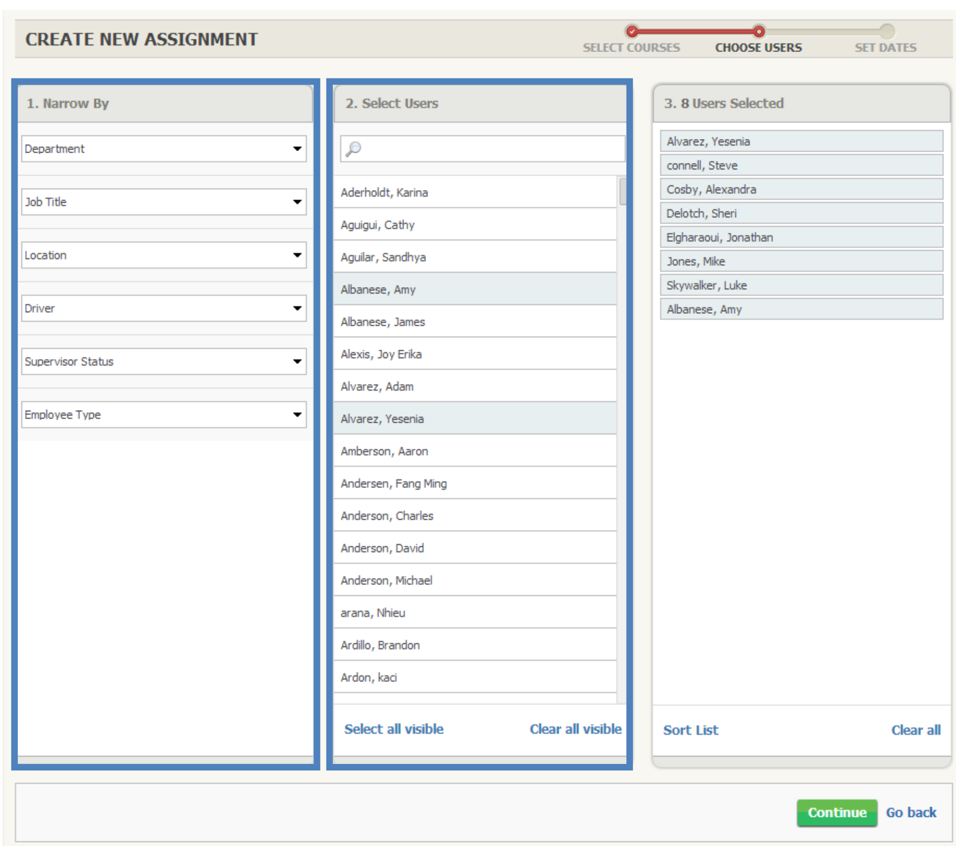
3. Select the Course or Activity by clicking the check box next to the title. Multiple assignments may be selected at one time:

4. To check your work, be sure to view that the correct number of items have been selected:

5. Once all assignments have been selected, click **Continue**:

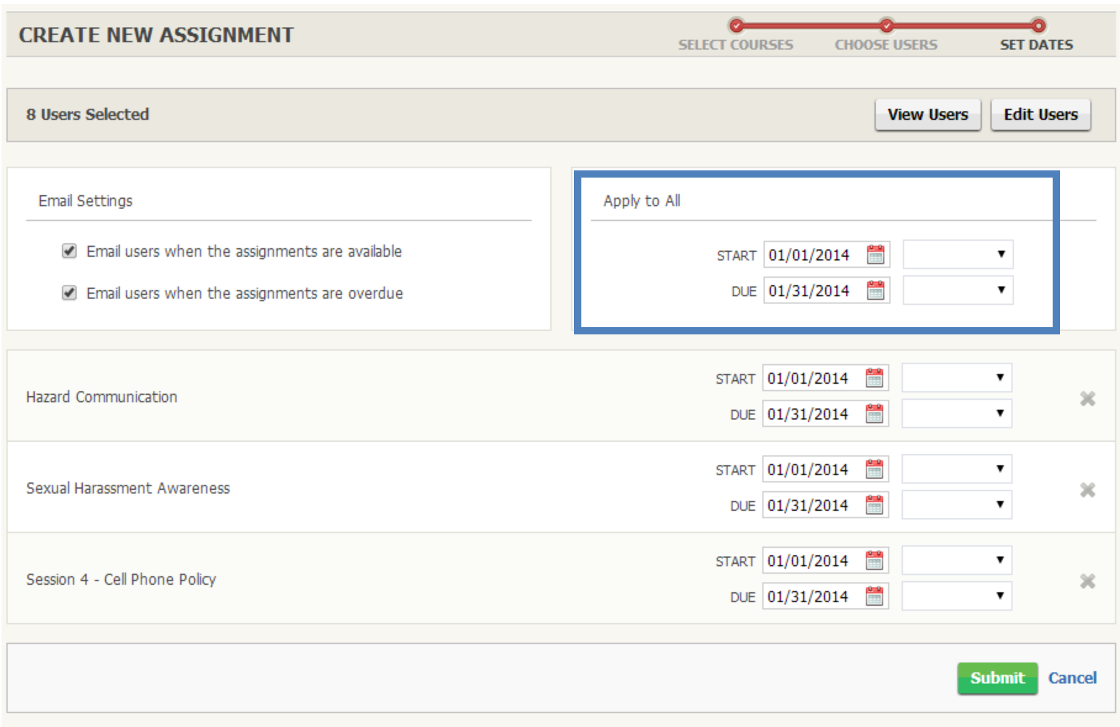


6. Select the user(s) to be assigned the assignment(s) by utilizing the **Standard Users Select** page **Narrow By** and **Select Users** columns. To select a user, click on their name:

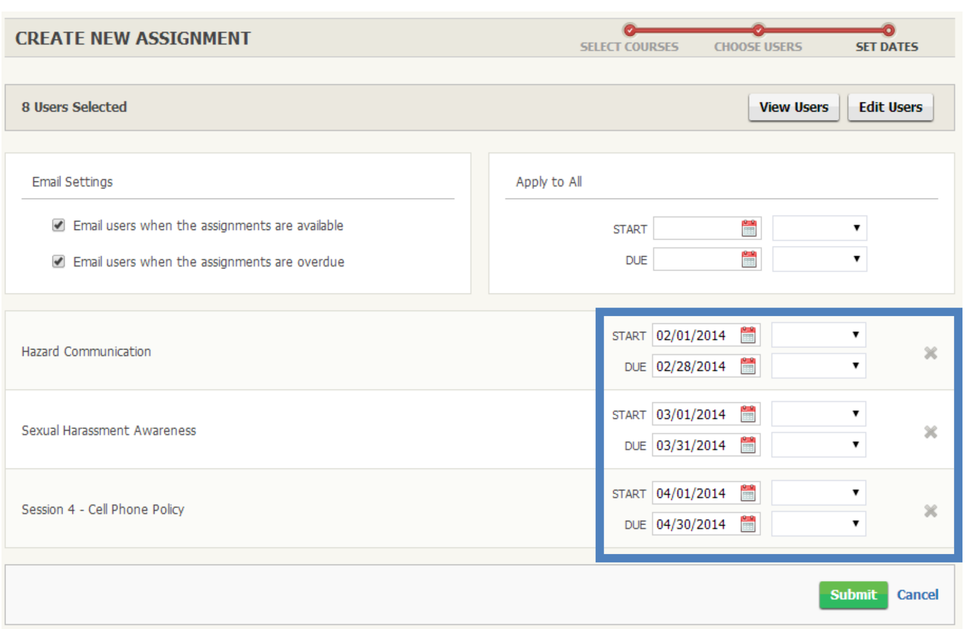


7. Once all users have been selected and are listed in the **Users Selected** column, click **Continue**:
8. Set up start and due dates:

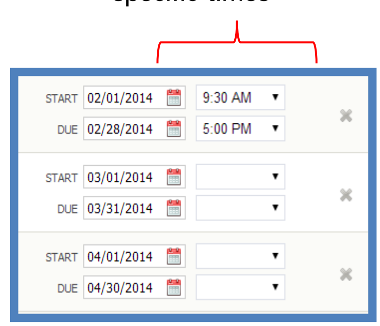
   Utilize the *Apply to All* section to give universal start and due dates for all assignments listed.



   Or, input start and due dates for individual assignments.



Utilize the drop-down function to select specific times

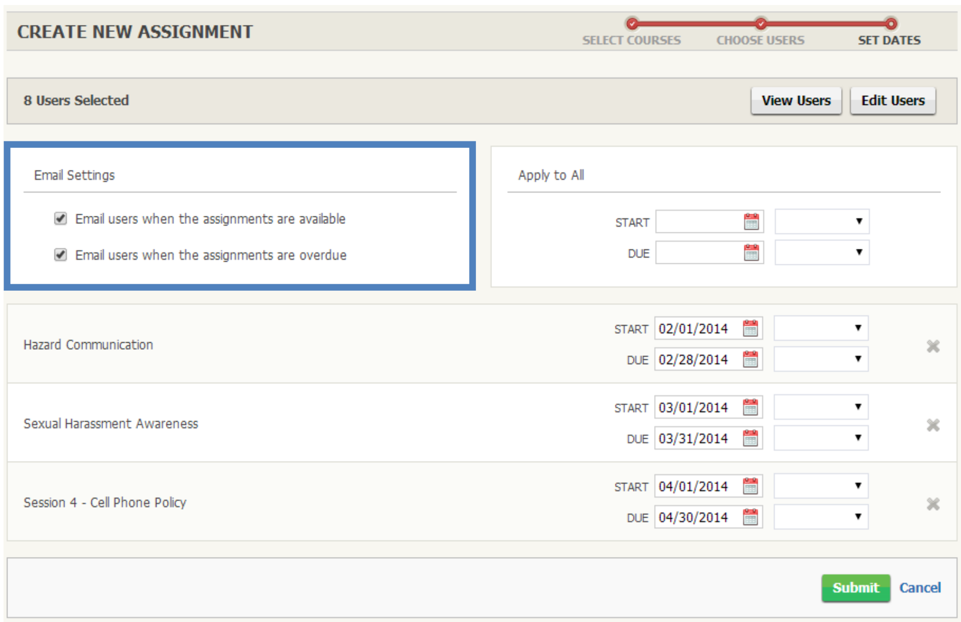


Time Saving Tip: If you already know the training required for the future, you can enter in assignments ahead of time by inputting "future" start dates. These assignments will not become available to the user until the indicated future date.

9. Set up email notifications*:

   Check the box next to “**Email users when the assignments are available**” to let the user know the assignment is now accessible from their TargetSolutions account.

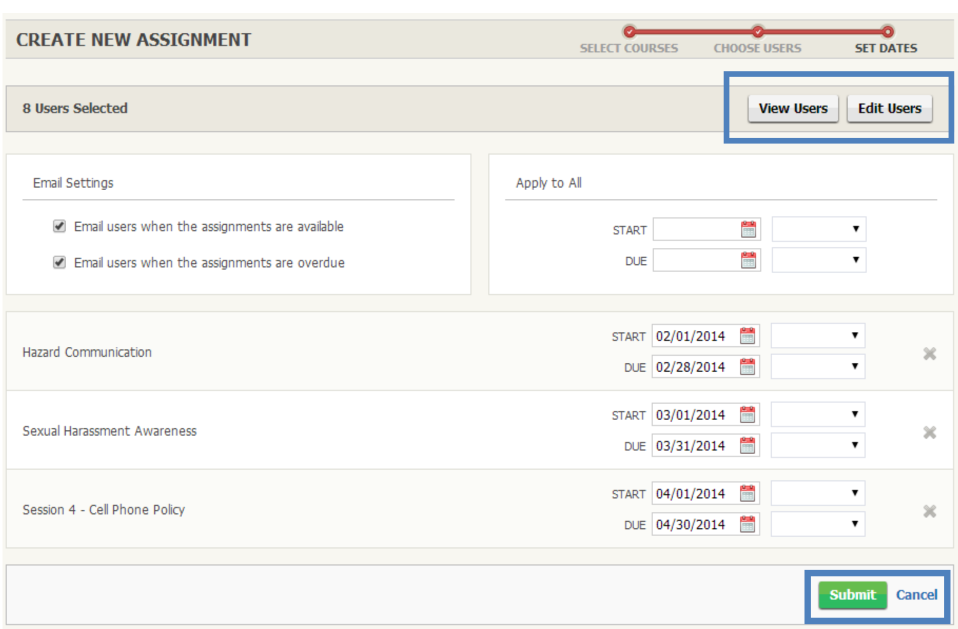
   Check the box next to “**Email users when the assignment is overdue**” to notify the user that their assignment is past due.



**To be eligible to receive email notifications, the user must have completed the email verification process.*

10. Before completing the assigning process, click **View Users** to view the users selected to receive the assignment. If needed, you can add or remove users for the assignment by clicking on **Edit Users.**

    To complete the assigning process, click **Submit**.



Generate Reports Overview

TargetSolutions *Generate Reports* Application easily allows Platform Managers to run reports on completed assignments, incomplete assignments, users, credentials, and components. Within this application, administrators can save reports, recreate popular reports, specify output columns and much more.

Report Types

Platform Managers have access to several different types of reports within the *Generate Reports* application.

The type of report generated will determine the information tracked and displayed to the Platform Manager.

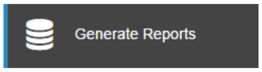
To select a report type, Platform Managers can choose from a list of reports located within the **Create New Report** option inside of the *Generate Reports* application.

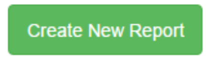
The **Create New Report** option includes the following: Assignments – Exception, Assignments – Incomplete, Assignments – Overdue, Completions, Completions – Aggregated, Completions – Exception, Completions by Components, Credentials, Credentials – Exception, Credentials - User Progress Summary, Tests – Completions, Tests - Question Analysis, Users

Report Name	Information Tracked
Assignments - Exception	Displays users who have no assignments that apply to all date, user and assignment criteria selected.
Assignments - Incomplete	Displays incomplete assignments that apply to all date, user and assignment criteria selected. Overdue assignments appear on this report if they also apply to all criteria selected.
Assignments - Overdue	Displays all overdue assignments that apply to all date, user and assignment criteria selected.
Completions	Displays completed assignments that apply to all date, user and assignment criteria selected.
Completions - Aggregated	Displays the total number and the duration of completed assignments for each user that apply to all date, user and assignment criteria selected.
Completions - Exception	Displays users who have not completed assignments that apply to all date, user and assignment criteria selected.
Completions by Components	Displays completed assignments based on component selections.
Credentials	Displays user credential information that applies to all date, user and credential criteria selected.
Credentials - Exception	Displays users with no active credentials. To clarify, the report will display the names of users with no credential record at all for the chosen credential or with a credential record in an expired, inactive or pending state for the chosen credential.
Credentials - User Progress Summary	Displays user progress toward completing the requirements of a credential.
Tests - Completions	Displays test questions and answer selections made by each user who completed the test within the given date range.
Tests - Question Analysis	Displays all questions that have ever appeared on the test selected, along with detailed information for each one.
Users	Extracts user information that applies to all date and user criteria selected.

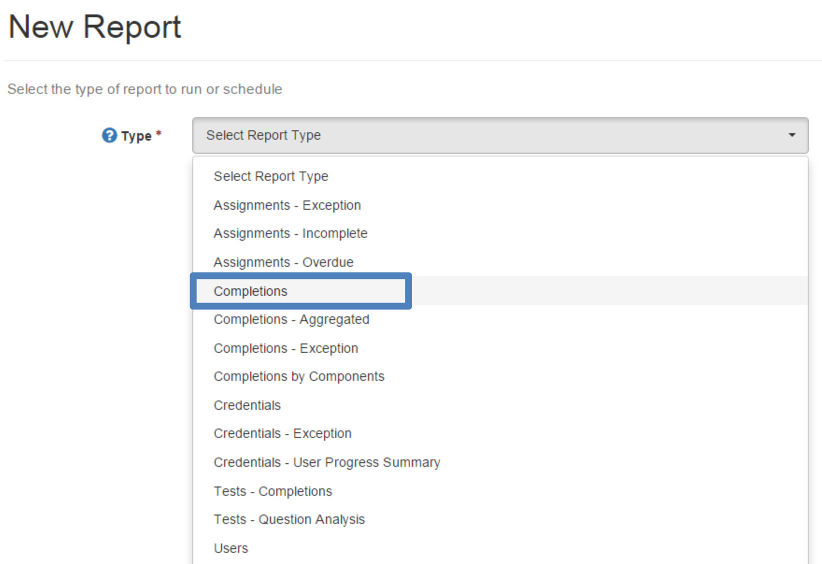
How to generate a new report

To access the *Generate Reports* application, please enter the Administration tab.

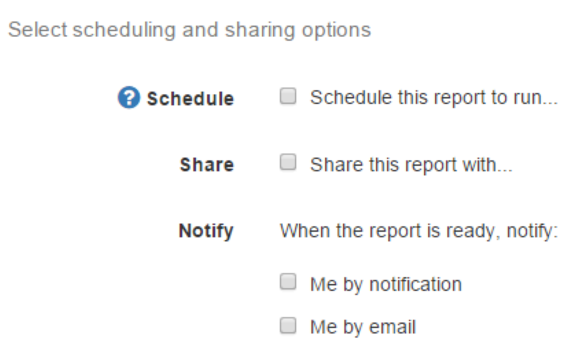
11. Click on 

12. Once inside the *Generate Reports* main page, click on 

13. Select the type of report that you would like to generate from the **Report Type** dropdown list. For this example, we will select **Completions**.



14. Then you will need to decide on scheduling, sharing, and notification



Schedule – Designates this report as a scheduled report that should be run automatically.

Share – Allows you to share your report with other administrators and supervisors with access:

- Check mark the box for 'Share this report with...'
- A Select users window will populate, and from here, you are able to select the administrators and/or supervisors that you would like to share the report with.

Notify – Allows you to select how you would like to be notified when your reports are ready:

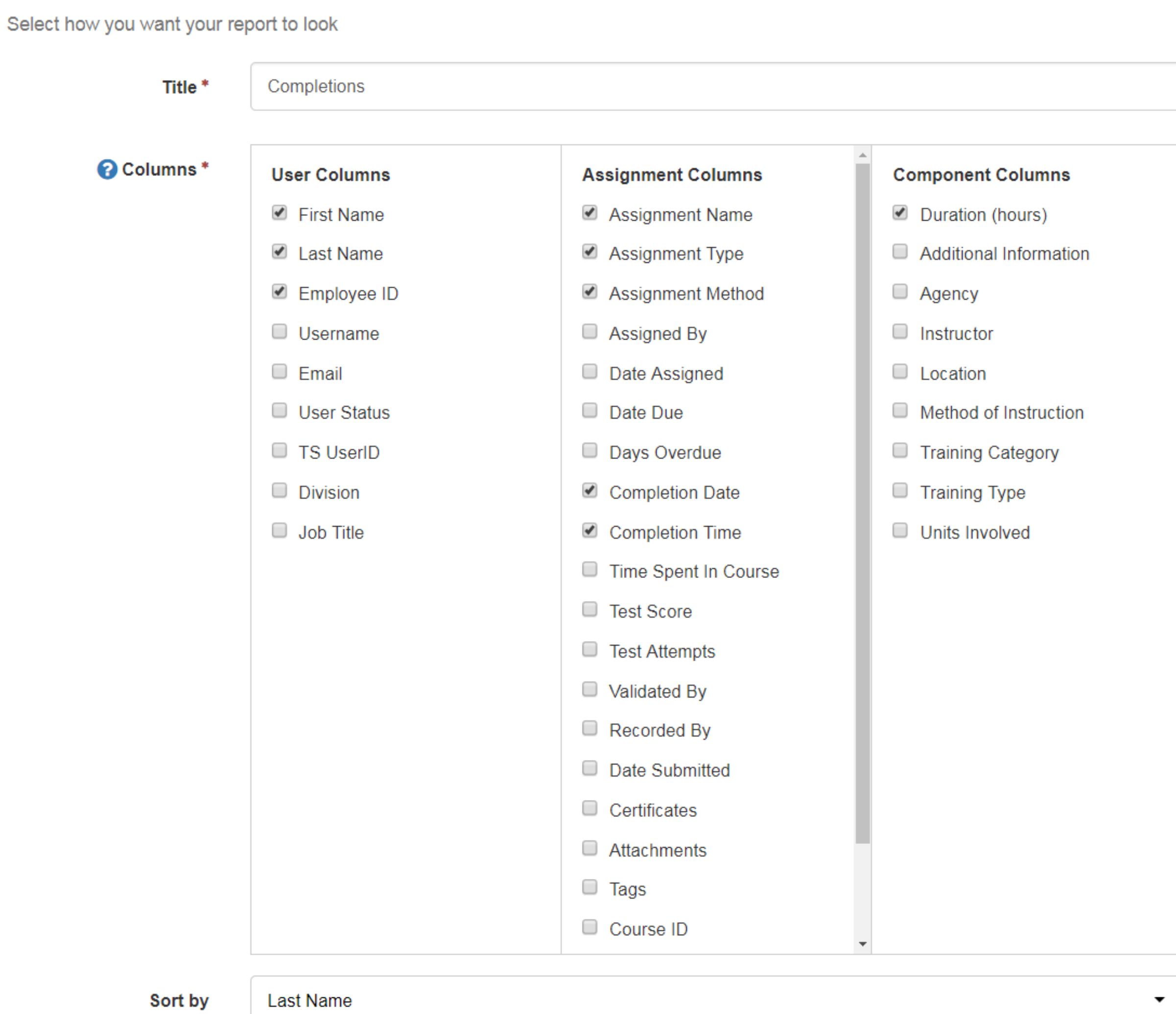
- Check one or more of our notification options
  - o Me by notification will notify you within the platform in your 'My Notifications' section.
  - o Me by email will notify you via email.

15. Then you need to select how you want your report to look – this area provides you with the ability to customize the report you are running.

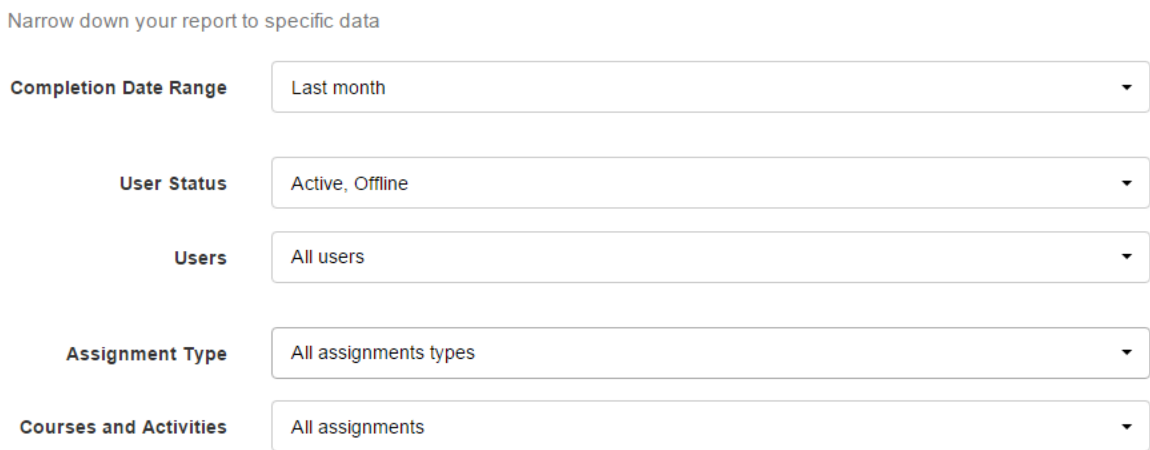
    Title – Create a new Title for your report

    Columns – This section provides you the ability to add or remove selected columns to your report. You can add or remove columns by selecting the appropriate checkboxes.

    - **Available Columns** – This section shows all available data columns for your report
    - **Selected Columns** – This section shows all data columns that will be included on the report (note: all the report have default selections)
    - **Sort By** – Allows you change the order in which the information will be displayed in your report



16. Then you need to narrow down your report to specific data – this area provides you with the ability to filter your report only on certain pieces of information



Completion Date Range: Defaults to All Time (all completions ever completed), but can be modified to a handful of default date ranges.

Custom: Filter to a date range of your choosing by choosing Custom and use our Calendar widgets to choose your date range

User Status: Defaults to show only users with Active or Offline accounts, but can also be modified to include Inactive accounts as well

Users: Ability to run report on only a selected group of users or specific users

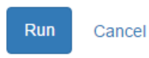
- **Select Groups:** Filter your report to run only on specific groups of users as defined in your Organization Profile
- **Select Users:** Filter your report to run only on specific user or users

Assignment Type: Filter your report to run on TargetSolutions created courses only (Courses Only) or assignments that you created (Activities only)

Courses and Activities: Filter your report to run on specific assignments

- **Select Tags:** Use this selection to filter your report to run on a particular group of assignments that you've previously tagged
- **Select assignments:** Use this selection to choose specific assignments to include on the report. Click your assignment names from the Available library section to move the assignment to the Selected Library section

  Tip: Use the "Filter by" courses and activities and/or tags section to narrow your options in the "Available Library" column.

17. Click on the Run button 

While the report generates, a dotted circle line animation will appear next to the report letting you know the report is generating.

18. After your report is run, you will see it listed in the Reports tab along with the details associated (Report Title, Type, who it has been shared with, and the date it was run).

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Title	Type	Shared with	Run Date
Certificates - Monthly Completions	Completions	Me (by Jennifer Jones)	Oct 7th, 2015 2:00 AM

19. Click the Blue Hyperlink of the report to view your report. After viewing you'll have a variety of options:

Details: Displays the filters selected and other pertinent information about the report

Download: Download report as a .csv (Excel File) with or without the Detail information included or as a non-editable PDF

Print: Print your report

Email: Send report via Email to other members of your organization using the smart search tool or to individuals outside your organization by entering their full email address

Copy: Brings you back to the report editing section with all of our settings, columns selected, and filters saved. You can use the report as a template and make any necessary edits from here.

Delete: Permanently deletes this report from your saved Reports view.

Course Library Overview

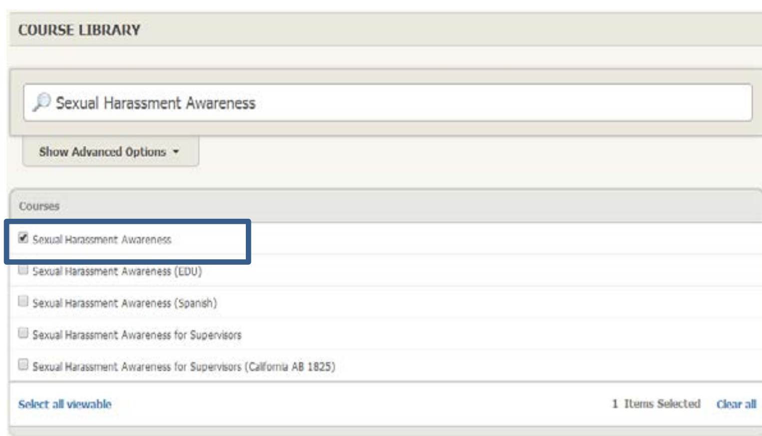
Course Library is located in the Administration section. With this tool, administrators are able to customize courses in one location. Here you can view course descriptions, upload and edit attachments, edit the passing grade, set course timer, add tags, and make courses self-assignable.

Review Courses and Descriptions

TargetSolutions' course catalog includes environmental training, health and safety training, and human resources training. These courses help organizations maintain compliance with federal and state regulations.

Here are the steps to view course descriptions:

1. In Course Library, check the box next to the course you wish to review. The field will populate with a brief description of the course, course duration, course audience, any prerequisites, and the regulatory references associated with that particular course. ***NOTE: You can search your Course Library by using the search function at the top of the page or scrolling through the alphabetical list.***



2. Use the scroll bar to see the entire Description. Click on the hidden printer icon above the scroll bar to print the Course Description.

Course Settings

Title

Sexual Harassment Awareness

Description

Overview of the course which is displayed on the course launch page.

Sexual harassment is a serious problem in the workplace. Victims of sexual harassment can suffer physical and emotional damage while companies can suffer financially from the negative publicity and litigation costs as well as from the loss of job productivity and deteriorated work environment for its employees.

This course has been designed to help prevent incidents of sexual harassment in the workplace as well as provide guidelines on what to do if such an incident occurs. It aims to help employees recognize the seriousness of violations of sexual harassment policy.

After completing the course, you should have a good idea of what sexual harassment is, how it affects the workplace environment, what your role is in preventing it, and what to do if you are a victim.

This training course has 10 learning modules with a ten-question exam.

Course Duration: 1 hour(s)