

Online Learning: How to run and read reports as an LMS club administrator

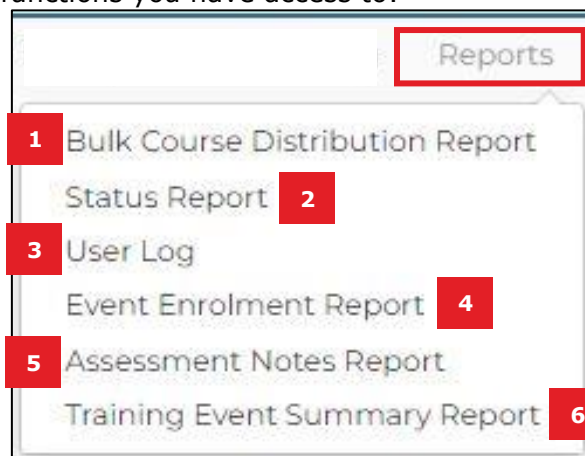
If you have any questions, problems or feedback please contact your club administrator or member.education@surflifesaving.org.nz.

What you will see

When building your reports, you have the ability to customize and filter these according to your individual reporting needs. You can filter by date ranges, completion status, individual bundles, learner groups and training groups.

All reports can be exported in **Excel, CSV and PDF** formats.

These are the reports/functions you have access to:



- 1. Bulk Course Distribution Report:** This report you can run the DAY AFTER you completed a bulk enrolment. This will show you who was NOT enrolled as they did not meet the pre-requisites.
- 2. Status Report:** This report will show you the training status and progress for all learners (from your club) within a course.
- 3. User Log:** This report will show you when a learner has logged into the system – it provides their name, last name, and email, last log in date / log out date (and will list each different login the user has made in separate rows). ***This report is really only useful at a National level, but is available for clubs to use.***
- 4. Event Enrolment Report:** This report outlines the events that have been set up and which learners have been enrolled into which events plus provides the status of event. (This is useful to see which learner is enrolled in which event & the status of events (i.e. of the event has/hasn't been marked complete).
- 5. Assessment Notes Report:** Assessors can add notes during assessment (i.e. swim time). This report outlines the notes added by the assessors through the Assessor App.
- 6. Training Event Summary Report:** This report outlines the status of each event, assessor and learner.

Training Groups: This new feature (not currently showing, but will soon) allows you to group multiple training courses together to help with building reports. ***This is not available on 1 July 2022, but is an improvement that is coming soon.***

Preparing groups for reports

Before we run the reports, let's cover some specific "language" you will see on screen, so you understand what they mean:

Etrainu Language	SLSNZ Language
Organisation	Surf Lifesaving New Zealand
Departments	SLSNZ Regions (i.e. Northern, Eastern etc.)
Sub-Organisations	Clubs (i.e. Nelson SLSC, Orewa SLSC etc.)
Course/Bundle	Courses and Awards
Inductions	Modules (or a 'part') of a course
Participants/Learner	Members/Learners

In the etrainu LMS, you can pre-set up groups. This is useful for reports that you run often. There are 2 types of groups that can be created:

1. **Training Groups** – This is where you can create a "group" of **multiple courses** you want to run reports on at the same time, so instead of running the reports one by one, you can place them in a "training group" and run them all together. An example of this may be ... if you always run reports for the SLA Refresher, PS Refresher, IRB Driver Refresher and RWC Operator Refresher, you can create a "Refresher Training Group" and run a report on all of them at once.

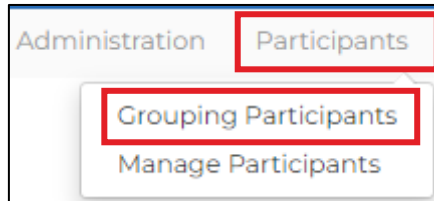
As mentioned before ...

Training Groups are not available on 1 July 2022, but is an improvement that is coming soon. A guidance document will be made available once it is released.

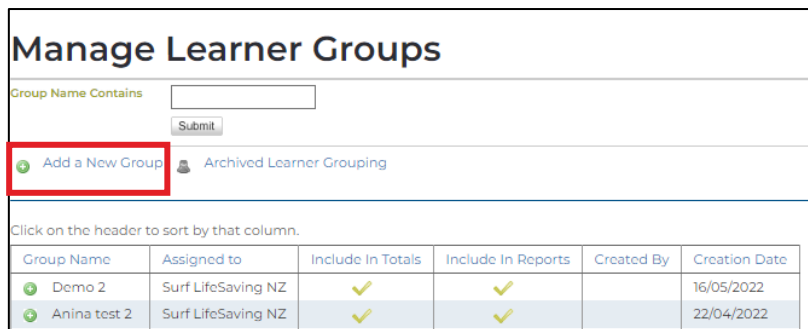
2. **Learner Groups** – This is where you can group together **individual learners** you always run reports on. So instead of running the reports one by one for each person, you can place them in a "learner group" and run them all together. An example of this may be ... if you always run reports for Person A, B C and D as they are your "examiners", you can create an "examiner" group and run a report for all of them at once.

To set up a "Learner Group"

1. Click "**Participant/Learners**" from the menu bar on the top of the screen, followed by "**Grouping Participants/Learners**"



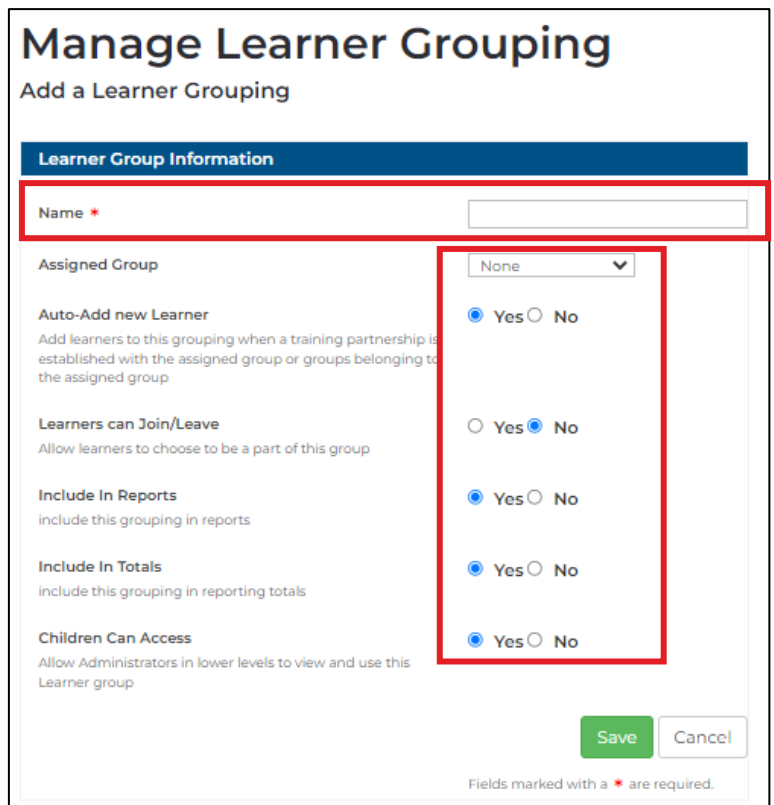
2. Select "**Add a New Group**"



Group Name	Assigned to	Include In Totals	Include In Reports	Created By	Creation Date
🟢 Demo 2	Surf LifeSaving NZ	✓	✓		16/05/2022
🟢 Anina test 2	Surf LifeSaving NZ	✓	✓		22/04/2022

3. Name the **Learner Group** you are creating
4. Select yes/no responses in accordance with your requirements

- a. Assigned Group – always select "**None**" – this is a system setting
- b. Auto-Add new Learner – select "**Yes**"
- c. Participants can Join/Leave – Select "**No**" as this is an admin only function
- d. Include in Reports – Select "**Yes**" as the groups directly relate to reporting
- e. Include in Totals – Select "**Yes**" as the groups directly relate to reporting
- f. Children can Access – in this instance "children" refers to LMS club Admins as "children" of the SLSNZ "parent", so this really only applies to regional and national level admins, but always say "**Yes**".



Manage Learner Grouping
Add a Learner Grouping

Learner Group Information

Name *

Assigned Group:

Auto-Add new Learner: Yes No

Learners can Join/Leave: Yes No

Include in Reports: Yes No

Include in Totals: Yes No

Children Can Access: Yes No

Fields marked with a * are required.

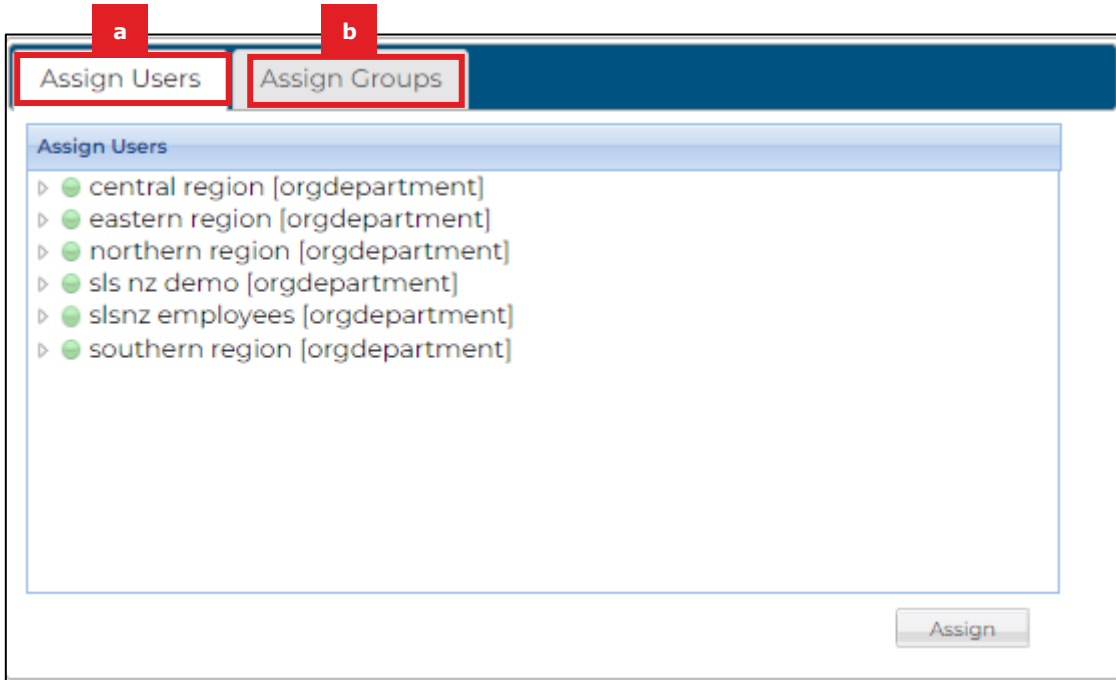
5. Click "**Save**"

6. Now that your “group name” will show ... to add Learners to the group, click the “plus” icon

Click on the header to sort by that column.

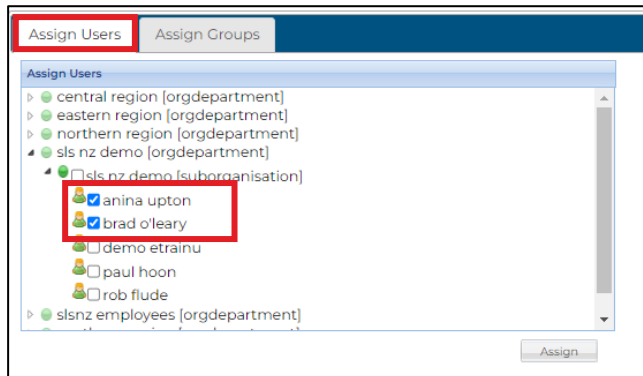
Group Name	Assigned to	Include In Totals	Include In Reports	Created By	Creation Date
   XYZ Club Instructors and Examiners	Surf LifeSaving NZ	✓	✓		05/04/2022

7. From here, you are greeted with two options: **Assign Users** and **Assign Groups**.



Assign Groups are **ONLY** for National Administrators and is not useful at a club level, so it is NOT covered in this guidance document.

8. Select the users or groups. In the “Assign Users” tab:
- Click on the white arrow (next to your club name) to drill down as far as you’d like to go.
 - To add a learner to this reporting group, select the individual learners you wish to assign to the ‘Learner Group’.



9. Click “**Assign**” and this group will now be available for selection in the reports.

Reporting

All report data is updated overnight, not just in time. So if you run a report it will always be "up to yesterday's date".

BULK COURSE DISTRIBUTION REPORT

As before, this report will show you (for those you bulk enrolled) who WERE enrolled or NOT enrolled as they did not meet the pre-requisite(s) for the course you bulk enrolled them into.

1. Click "**Reports**" from the menu bar on the top of the screen, followed by "**Bulk Course Distribution Report**".




2. Search for the "course" you wish to run the report for by adding the search details and clicking "**Submit**".

Select from the drop down box the column header you wish to sort by then enter the key word in search field in relation to that column.

Keywords

3. If you review the results below you will see "a line" for each bulk assign you completed.
 - a. The "Submitted" column shows how many learners you tried to BULK enrol
 - b. The "Allocated" column shows you how many were ENROLLED
 - c. The "Not allocated" column show you how many were NOT ENROLLED as they did not meet the pre-requisites for the course.

Click on the header to sort by that column.

Batch	Course Name	Submitted On	Submitted By	Bundle	Processed On	Submitted	Allocated	Not Allocated	Reports
3	SLSNZ - Rescue Water Craft (RWC) Pre-Learning	24/05/2022 13:52:12	Poppy Crouch	Yes	24/05/2022 18:30:11	5	1	4	
Total						5	1	4	

4. In the "Reports" column, click on the report icon
5. Here you can see the names of the learners that were/were not enrolled.

STATUS REPORT

1. Click "**Reports**" from the menu bar on the top of the screen, followed by "**Status Report**".



The **Training Status Report** outlines the training status for your Learners and can be filtered to suit your needs.

To build your report, consider the following filters:

1. Leave the "Organisation" as Surf Lifesaving NZ
2. Select YOUR REGION under "Department"
3. Select YOUR CLUB under "Sub organisation"

Or if you'd like to run a report for your "Learner Group" created before, you can select that group under "Learner Group".

ORGANISATION	Surf LifeSaving NZ
DEPARTMENT	Select department ▼
SUB-ORGANISATION	Select sub-organisation ▼
	OR
LEARNER GROUP	Select learner group ▼

4. Select the Course you'd like to report on under "Course"
5. If you'd like to report on parts of a course, you can select these under "Module," i.e. if you only wanted to see who has completed their "CPR" practical assessment.

COURSE	SLSNZ - Be Safer: A Risk Management Online Module × ▼
MODULE	Select training ▼
TRAINING GROUP	Select training ▼

6. Select the "Training Status" you'd like to include in the report: In Progress; Completed etc.
7. Select the report date range in: "Date Training was assigned", and/or "Date user was created" and/or "Date Course was Completed"

TRAINING STATUS	In Progress <input checked="" type="checkbox"/> Completed <input checked="" type="checkbox"/>
DATE TRAINING WAS ASSIGNED	This calendar year <input checked="" type="checkbox"/>
	FROM: 01/01/2022 TO: 31/12/2022
DATE USER WAS CREATED	Select a date range
DATE COURSE WAS COMPLETED	Select a date range

8. Choose what additional information you would like to see for each learner by ticking them under "Extra Display Fields" (such as region, date of birth, email, club etc.)
9. Tick the "Include Archived Users" if you'd like to see the records of those who NO LONGER have access to the Online Learning Portal.

EXTRA DISPLAY FIELDS	Select extra fields to include in report results
ADDITIONAL OPTIONS	<input checked="" type="checkbox"/> INCLUDE ARCHIVED USERS

SUBMIT

10. Click "**Submit**" to create your report.

To read your report:

11. Scroll to the bottom of the page under the "Report Results" heading

First you will see a summary table:

- Total Results = Total number of assigned courses for your report selections (and includes all course statuses)
- Totals in the rows below the top row = Totals for each "status" (i.e. number of learners who are in progress, completed)

Property	Value	Percentage	Detail
Total Results	3	100%	Total number of assigned Courses found in the report.
Total Status: "IN PROGRESS"	3	100.0%	Total number of assigned Courses with the status "IN PROGRESS".

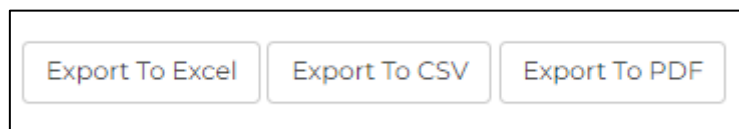
Underneath the summary table is your "on screen" report. You can:

- Click on the "**header**" of each column to sort by that column
- For each learner it will show you their status, when they were provided with access, the completion date (if completed); the course expiry date and progress; plus any additional fields you selected to see.

Click on the header to sort by that column.

Firstname	Surname	Username	Course	Status	Access Allowed Date	Completion Date	Course Expiry Date ⓘ	Accreditation Expiry Date ⓘ	Progress
Demo	Etrainu	demoslsnz	SLSNZ - Be Safer: A Risk Management Online Module	IN PROGRESS	16/03/2022		16/03/2023		0% (0 / 1)
Brad	O'Leary	Brad.O'Leary@surflifesaving.org.nz	SLSNZ - Be Safer: A Risk Management Online Module	IN PROGRESS	04/04/2022		04/04/2023		0% (0 / 1)
Test	Scorm	test.scorm.slsnz	SLSNZ - Be Safer: A Risk Management Online Module	IN PROGRESS	26/05/2022		26/05/2023		0% (0 / 1)
Anina	Upton	Anina.Upton@surflifesaving.org.nz	SLSNZ - Be Safer: A Risk Management Online Module	IN PROGRESS	10/05/2022		10/05/2023		0% (0 / 1)
Anina	Upton	Anina.Upton@surflifesaving.org.nz	SLSNZ - Be Safer: A Risk Management Online Module	COMPLETE	04/04/2022	08/04/2022 11:57:33	04/04/2023		100% (1 / 1)

12. Click on the "**Export to Excel**", "**Export to CSV**" or "**Export to PDF**" to export the report for other purposes



EVENT ENROLMENT REPORT

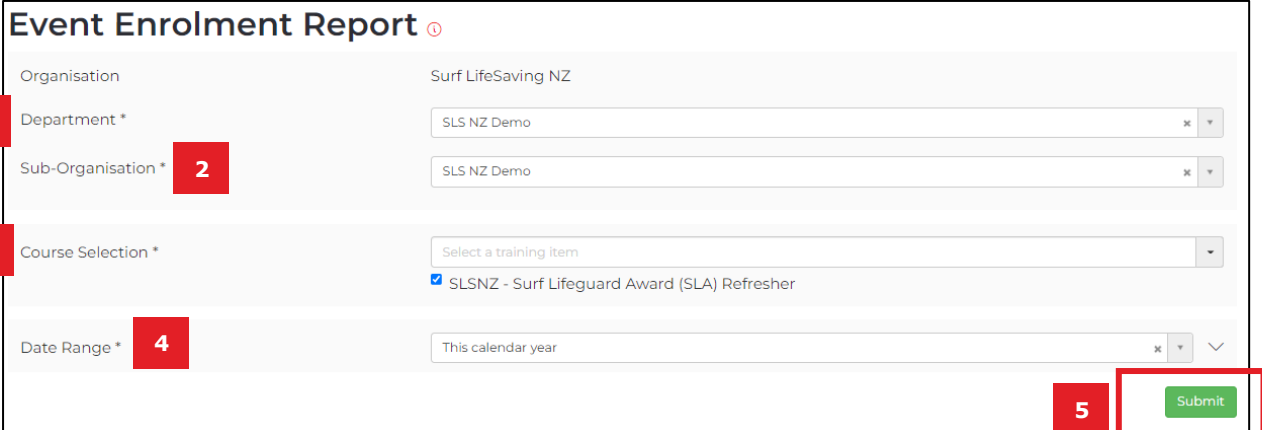
1. Click "**Reports**" from the menu bar on the top of the screen, followed by "**Event Enrolment Report**".



The **Event Enrolment report** outlines the events and their status PLUS provides the status of the learner's 'course' completion.

To build your report, consider the following filters:

1. Select YOUR REGION under "Department"
2. Select YOUR CLUB under "Sub organisation"
3. Choose the course related to the event (s) you'd like to see
4. Select the report date range
5. Click Submit



A screenshot of the 'Event Enrolment Report' form. The form title is 'Event Enrolment Report' with a close icon. The form contains several fields with red numbered callouts: 1. 'Department *' dropdown menu with 'SLS NZ Demo' selected. 2. 'Sub-Organisation *' dropdown menu with 'SLS NZ Demo' selected. 3. 'Course Selection *' dropdown menu with 'SLSNZ - Surf Lifeguard Award (SLA) Refresher' selected. 4. 'Date Range *' dropdown menu with 'This calendar year' selected. 5. A green 'Submit' button.

To read your report:

This will display every learner enrolled into the **course** you selected. It will also tell you their:

- Course Status
- Course completed date (if applicable)
- The event they have been enrolled into or if they have not enrolled into any events yet

First Name	Last Name	Email	Course Name	Course Status	Course Complete Date	Event Name & Status
Anina	Upton	Anina.Upton@surflifesaving.org.nz	SLSNZ - Surf Lifeguard Award (SLA) Refresher	In Progress	N/A	Papamoa SLSNZ - Surf Lifeguard Refresher Day, Sub-org: SLS NZ Demo Status: Scheduled
Demo	Etrainu	admin@etrainu.com	SLSNZ - Surf Lifeguard Award (SLA) Refresher	In Progress	N/A	Not enrolled in any event

NOTE for common question: See the event status (Scheduled vs Completed). If an event is not showing as “completed” this is usually why a learner’s COURSE STATUS will show as still “in progress” and not passed.

This report can only be exported to CSV, by clicking on the “Export to CSV” button.



ASSESSMENT NOTES REPORT:

Assessors can add “notes” to a learner’s record during an event assessment (i.e. adding the learner’s swim time in the 400m pool swim).

The **Assessment Notes report** outlines these notes added when a learner is assessed through the assessing app. This will include data from closed and “still open” events.

1. Click “**Reports**” from the menu bar on the top of the screen, followed by “**Assessment Notes Report**”.



To build your report, consider the following filters:

1. Select YOUR REGION under "Department"
2. Select YOUR CLUB under "Sub organisation"
3. Choosing a particular learner is optional
4. Choose the course related to the event (s) you'd like to see
5. Select the report date range
6. Click Submit

Assessment Notes Report ⓘ

Member Group - Select a member group

Organisation: Surf LifeSaving NZ

1 Department * x v

Sub Organisation * **2** x v

3 Participant v

Course * **4** v
 SLSNZ - Surf Lifeguard Award (SLA) Refresher

5 Date Range * x v v

6 Submit

To read your report:

This will display every learner enrolled into the course you selected. It will also tell you their:

- Event where the note was added
- The practical "module" the note related to
- The note added by the assessor (word for word) with the date the note was added

First Name	Last Name	Email	Course Name	Course Status	Course Complete Date	Event Name & Status	Course Module	Assessor Notes
Anina	Upton	Anina.Upton@surflifesaving.org.nz	SLSNZ - Surf Lifeguard Award (SLA) Refresher	In Progress	N/A	Papamoa SLSC - Surf Lifeguard Refresher Day, Status: Scheduled	SLA Refresher 200m Run-Swim-Run/400m Swim - SLSNZAA	"200 swim - 11:23min" Anina Upton (08-Apr-2022)

This report can only be exported to CSV, by clicking on the "Export to CSV" button.



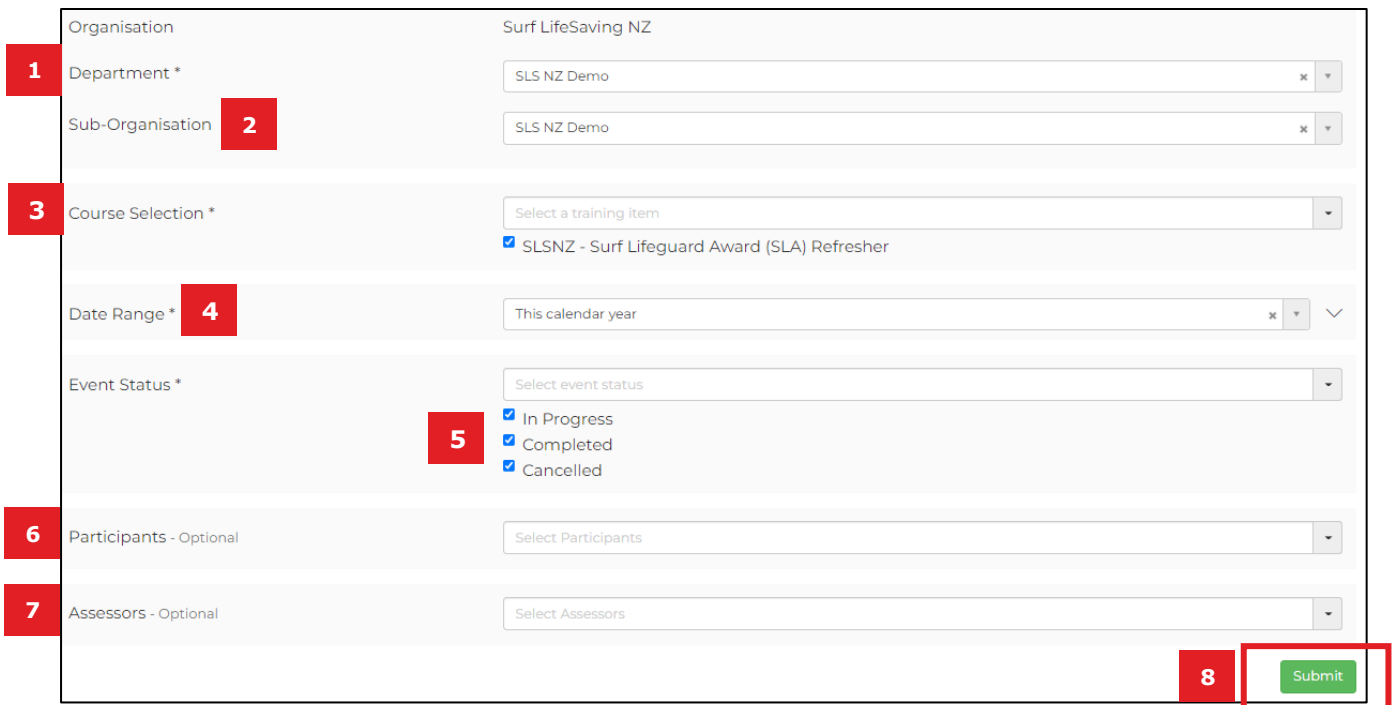
TRAINING EVENT SUMMARY REPORT

1. Click "**Reports**" from the menu bar on the top of the screen, followed by "**Training Event Summary Report.**"



To build your report, consider the following filters:

1. Select YOUR REGION under "Department"
2. Select YOUR CLUB under "Sub organisation"
3. Choose the course (s) related to the event (s) you'd like to see
4. Select the report date range
5. Choose the event status (In Progress; Completed; Cancelled)
6. Choosing a particular learner is optional
7. Choosing to run a report "by Assessor" is also optional
8. Click Submit



A screenshot of a web form for generating a Training Event Summary Report. The form contains several filter fields, each with a red number indicating a step:

- 1** Organisation: Surf LifeSaving NZ
- 1** Department *: SLS NZ Demo
- 2** Sub-Organisation: SLS NZ Demo
- 3** Course Selection *: Select a training item. A checkbox is checked for "SLSNZ - Surf Lifeguard Award (SLA) Refresher".
- 4** Date Range *: This calendar year
- 5** Event Status *: Select event status. Three checkboxes are checked: "In Progress", "Completed", and "Cancelled".
- 6** Participants - Optional: Select Participants
- 7** Assessors - Optional: Select Assessors
- 8** Submit: A green button labeled "Submit" is highlighted with a red box.

To read your report:

This will display every event in the date range you selected, relating to the course you selected and for each event will show you:

- The start and end date of each event
- The assessors for the event(s)
- The status of each of the events
- The learners and their course status for each event

Event Name	Sub-Organisation	Courses	Start Date	End Date	Assessors	Event Status	Participants 
SLSNZ - Surf Lifeguard Award (SLA) Refresher test	SLS NZ Demo	SLSNZ - Surf Lifeguard Award (SLA) Refresher	9th Mar 2022	9th Mar 2022	Demo Etrainu	Cancelled	
SLA Refresher	SLS NZ Demo	SLSNZ - Surf Lifeguard Award (SLA) Refresher, SLSNZ - Surf Official Level 2 Course	29th Mar 2022	29th Mar 2022	Demo Etrainu	In Progress	Demo Etrainu SLSNZ - Surf Official Level 2 Course - <i>In Progress</i>
DEMO - 4.1.22	SLS NZ Demo	SLSNZ - Surf Lifeguard Award (SLA) Refresher	1st Apr 2022	1st Apr 2022	Demo Etrainu	Cancelled	Demo Etrainu SLSNZ - Surf Lifeguard Award (SLA) Refresher - <i>N/A</i>
Papamoa SLSC - Surf Lifeguard Refresher Day	SLS NZ Demo	SLSNZ - Surf Lifeguard Award (SLA) Refresher	8th Apr 2022	8th Apr 2022	Demo Etrainu, Anina Upton	In Progress	Anina Upton SLSNZ - Surf Lifeguard Award (SLA) Refresher - <i>In Progress</i>

This report can only be exported to CSV, by clicking on the "Export to CSV" button.

