Axcess Team Leader

During, this course you will learn how to:

- View your direct report's training transcripts.
- Run individual or team reports in Axcess.

Introduction

Viewing Direct Report Transcripts

Running Report

Summary

Introduction

Axcess for Managers

Did you know, you can use Axcess to oversee your direct reports training completions and progress?

Save your inbox from overdue email notifications.

CONTINUE

Axcess give you Access to more

Besides having the ability to oversee direct reports, and run reports; Managers have the capability of being able to see courses and learning paths, see who is scheduled for sessions, see what is completed or not completed, and more.

Viewing Direct Report Transcripts

To begin go into Axcess

When you log into Axcess, on your dashboard you will see along the blue bar; Home, Content Library, Achievements, Live Sessions, and Manager.

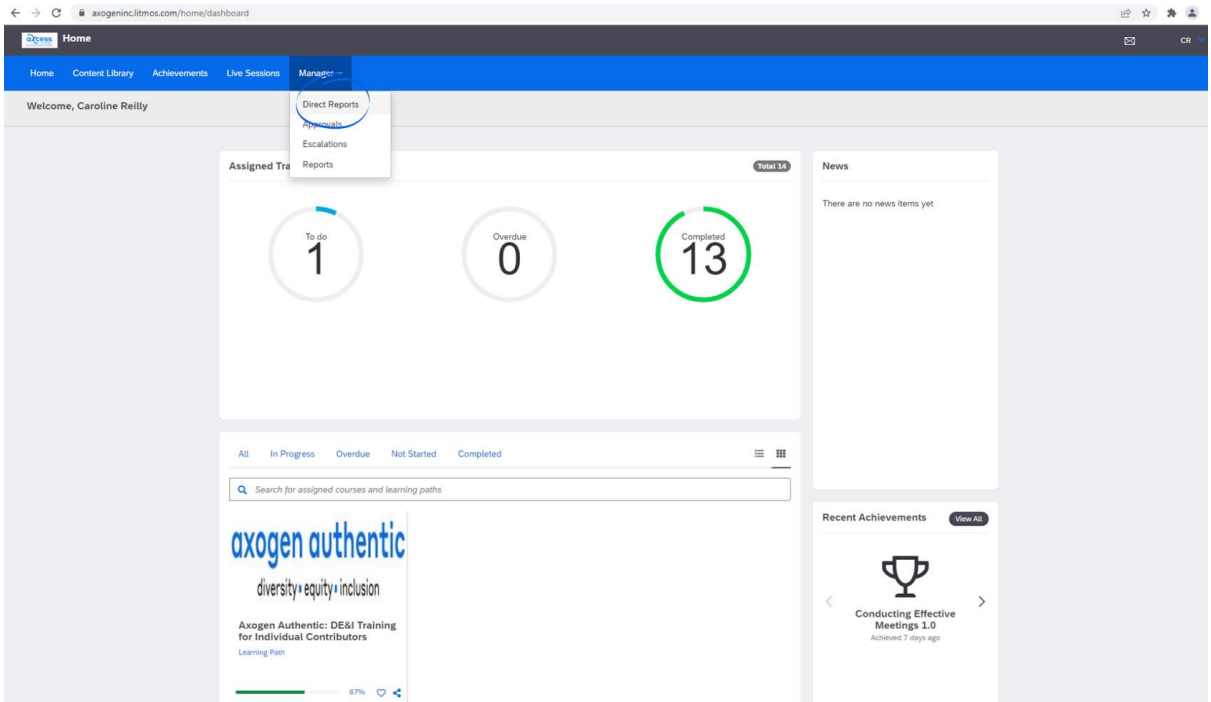
To quickly make sure your team is up-to-date on all required trainings select the manager drop down in the blue bar.

Viewing Direct Reports Training Transcripts

Click the Start button

Step 1

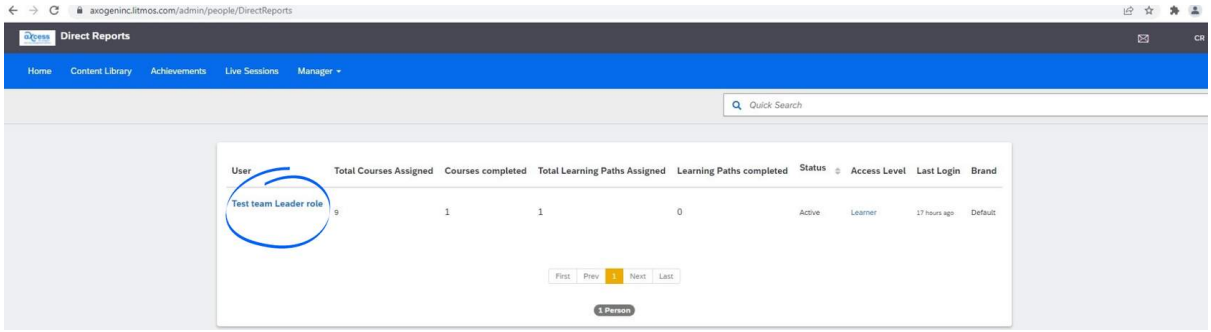
Select the manager tab



To view a quick overview of your direct employees training transcript, select direct reports from the drop down.

Step 2

Team Training Overview

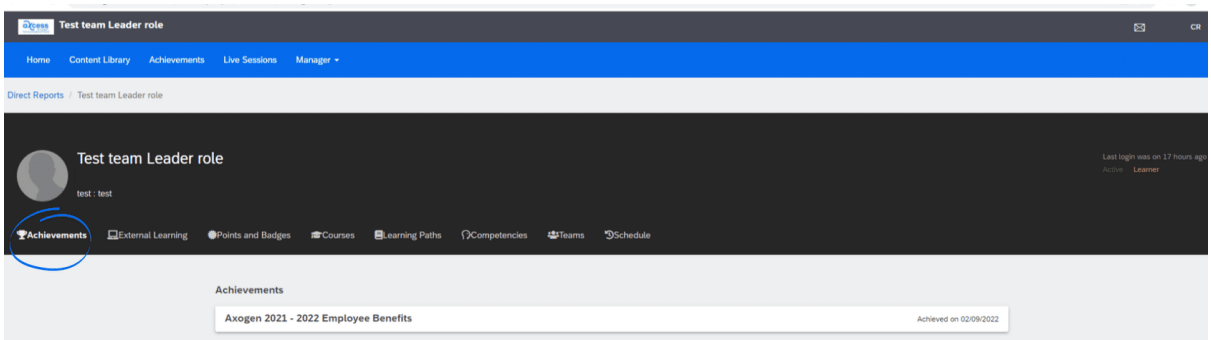


Once you have selected on Direct Reports, you will see a high-level overview of your team's training assignments and completions. To view the specific details for an individual employee, click on their name highlighted in blue.

Once you have clicked on their name/role title in blue, it will then take you to their achievements.

Step 3

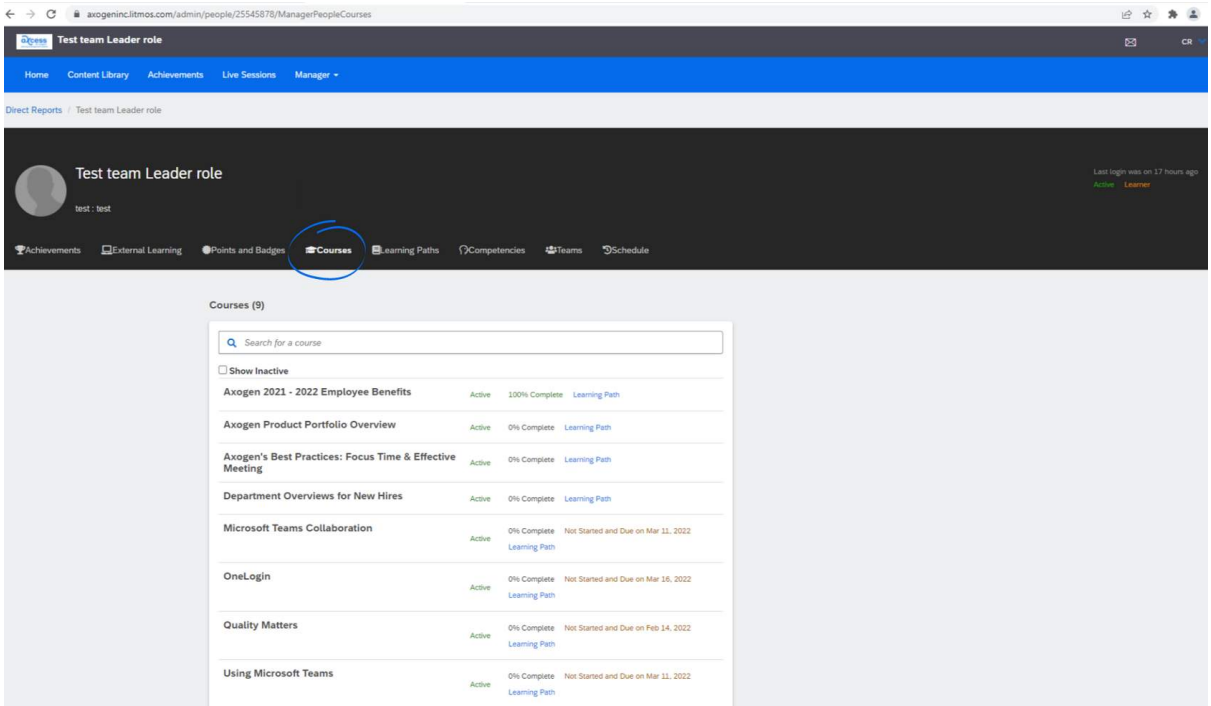
Achievements



You are now on the direct report's learning achievements. This page will list all courses and learning paths that have been completed in Axcess and provide the associated completion date.

Step 4

Courses

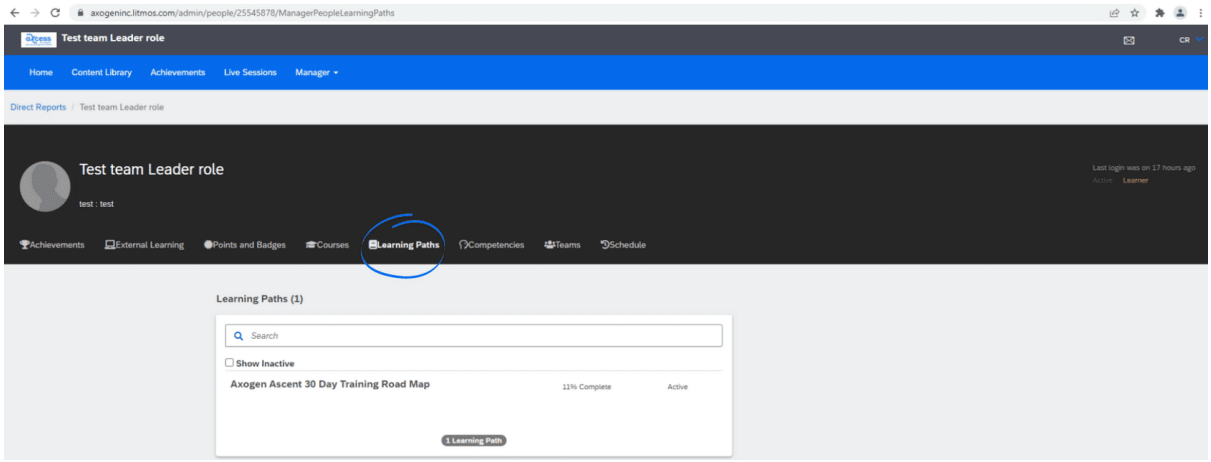


View all assigned, in-progress and completed courses in the courses tab.

Tip: If the course has a due date it is listed in red.

Step 5

Learning Paths



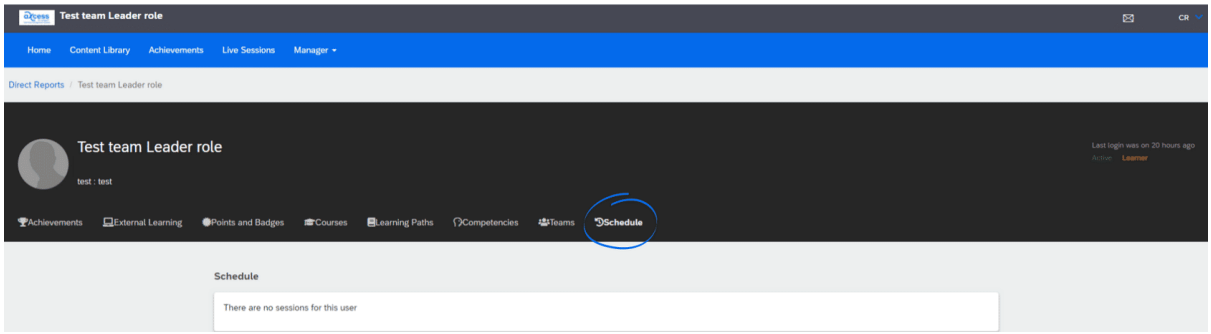
You will also be able to see the users Learning Paths. Learning Paths are multiple modules that have to be completed before the Learning Paths can be completed. This will also show how much has been completed by the user, and if the Learning Path is active or not.

An example of a Learning Path:

- Axogenic Leadership

Step 6

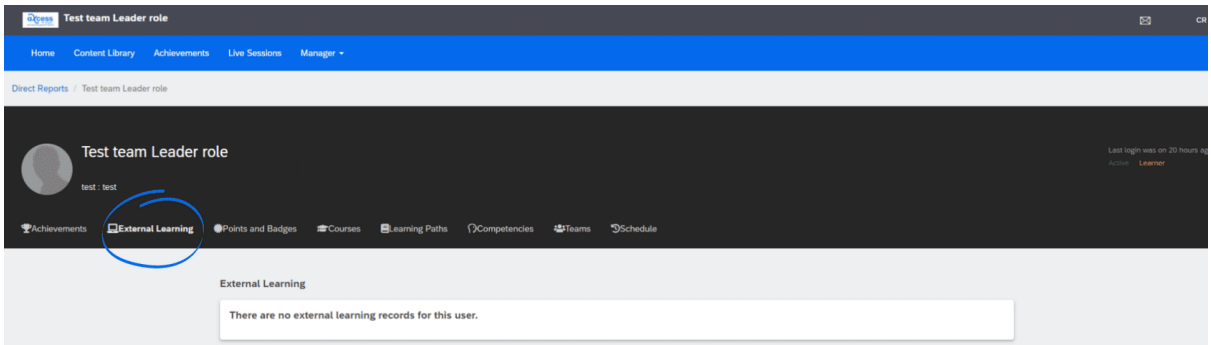
Schedule



See if your direct report has completed or is scheduled for any upcoming instructor-led trainings.

Step 7

External Learning



When you click on the external learning tab, you can view what has been completed and uploaded to Axcess.

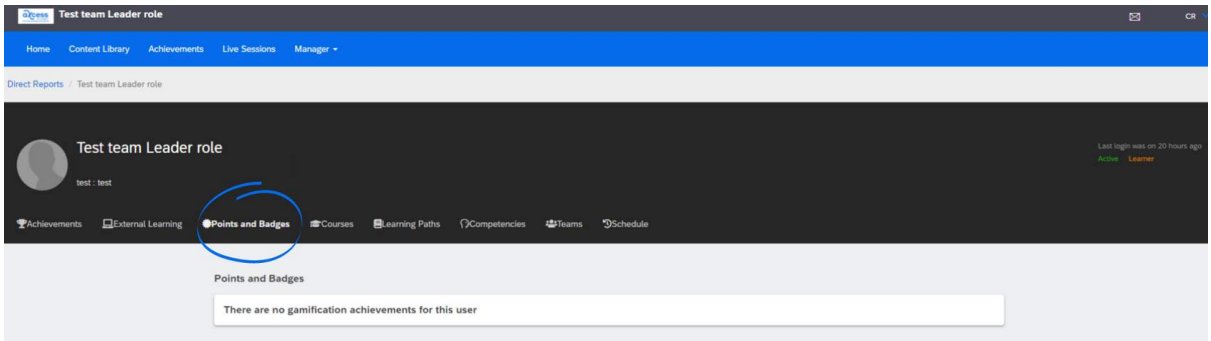
Tip: This information can then be used in your career progression conversations.

Some example include:

- Leadership development training
- Project management certification (i.e. PMP)
- Finance/Accounting/Payroll (i.e. CPA, ACA, CPP, etc.)
- Human resources (i.e. PHR)Six Sigma
- Public Speaking (i.e. Dale Carnegie)Etc.

Step 8

Points and Badges



Depending on the course or learning path completed your direct report may earn points and/or badges.

- Points and Badges can be earned from completing courses and learning paths.

Summary

You should now be able to view and navigate the Direct Reports Transcripts in Axcess. As well as know the differences between Courses and Learning Paths.

Jen has come to you about not having training on compliance, where can you go to check to see if Jen has this training?

- ◯ Courses
- ◯ Points and Badges

SUBMIT

Complete the content above before moving on.

Match the scenario to the correct Axcess tab.

Course tab	Check to see if your direct report has competed the Intro to Compliance training.
Learning Path	Check to see if your direct report is enrolled in the Axogenic Leadership training program
Schedule	Check to see if your direct report is registered for an upcoming DE& I workshop.

SUBMIT

Running Report

Running Reports

Running reports give you the ability to view your direct reports training activity and completions in Axcess.

There a few different types of reports you can run depending on the information you need.

User Transcript Reports

See all the course and learning path completions for a specific employee.

Make sure your employees

Course / Learning Path Reports

Make sure your employees complete training on time by running a completion report for specific courses.

Build Your Own

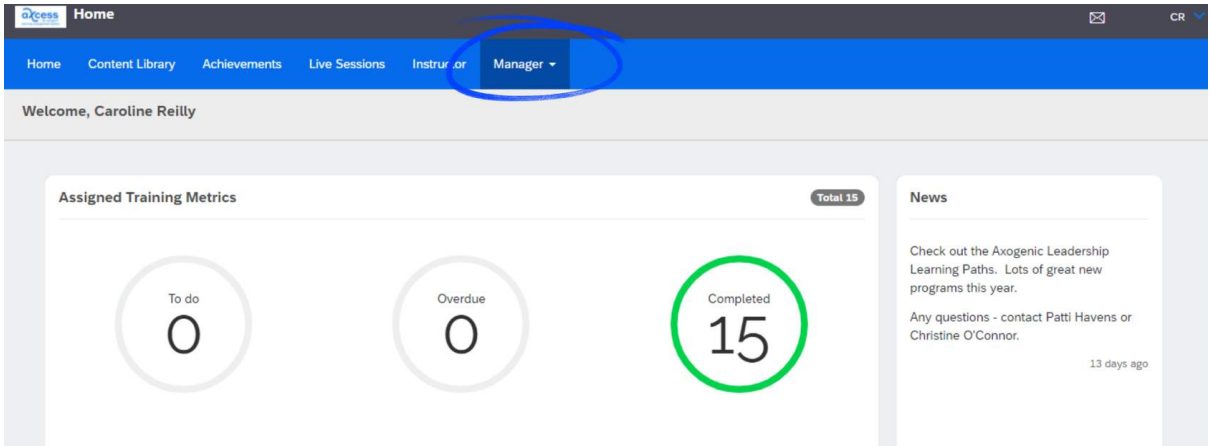
Create your own customized report by selecting the information you need to see.

Running a Training Transcript for Courses

Select the start button to view the step-by-step instructions for running a report to view all the assigned, completed, and in-progress trainings for a specific team member.

Step 1

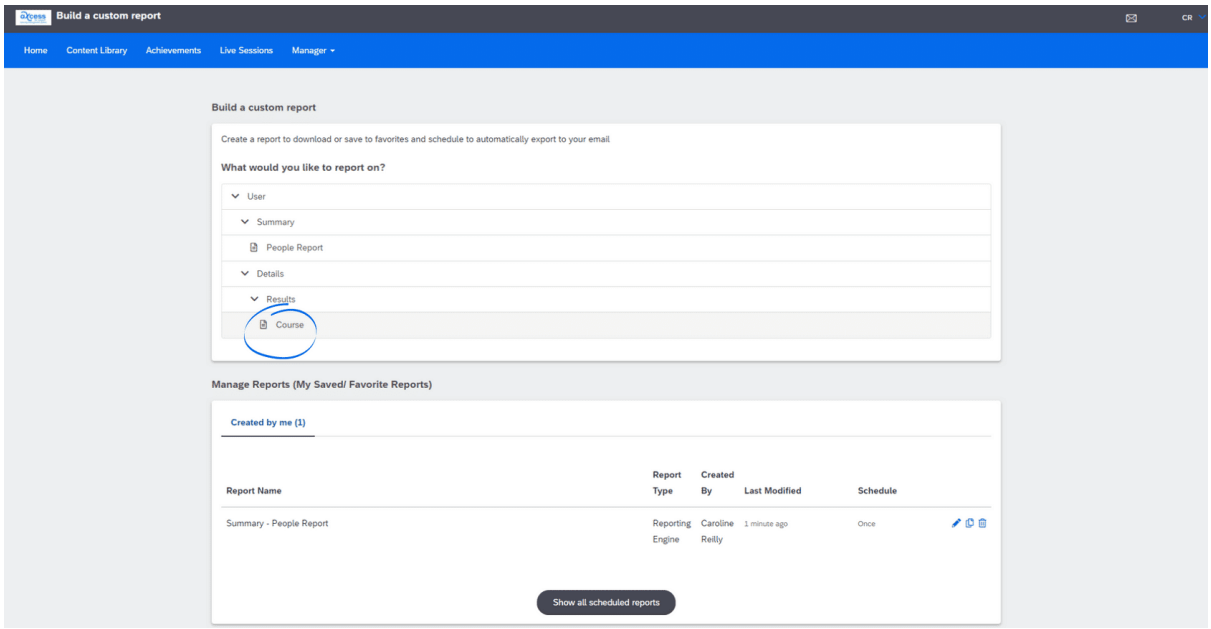
Manager



Select manager and choose reports from the drop-down.

Step 2

Running a Course Report

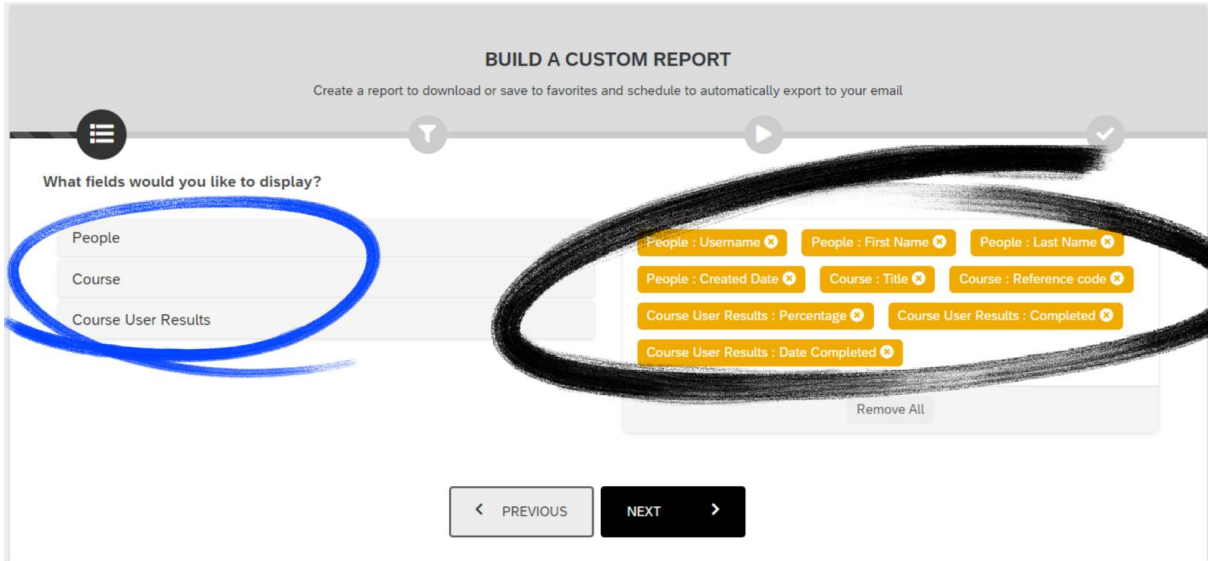


You also have the ability to run reports on the courses, or onboarding assignments.

To run a course report, click on course.

Step 3

Building a Report

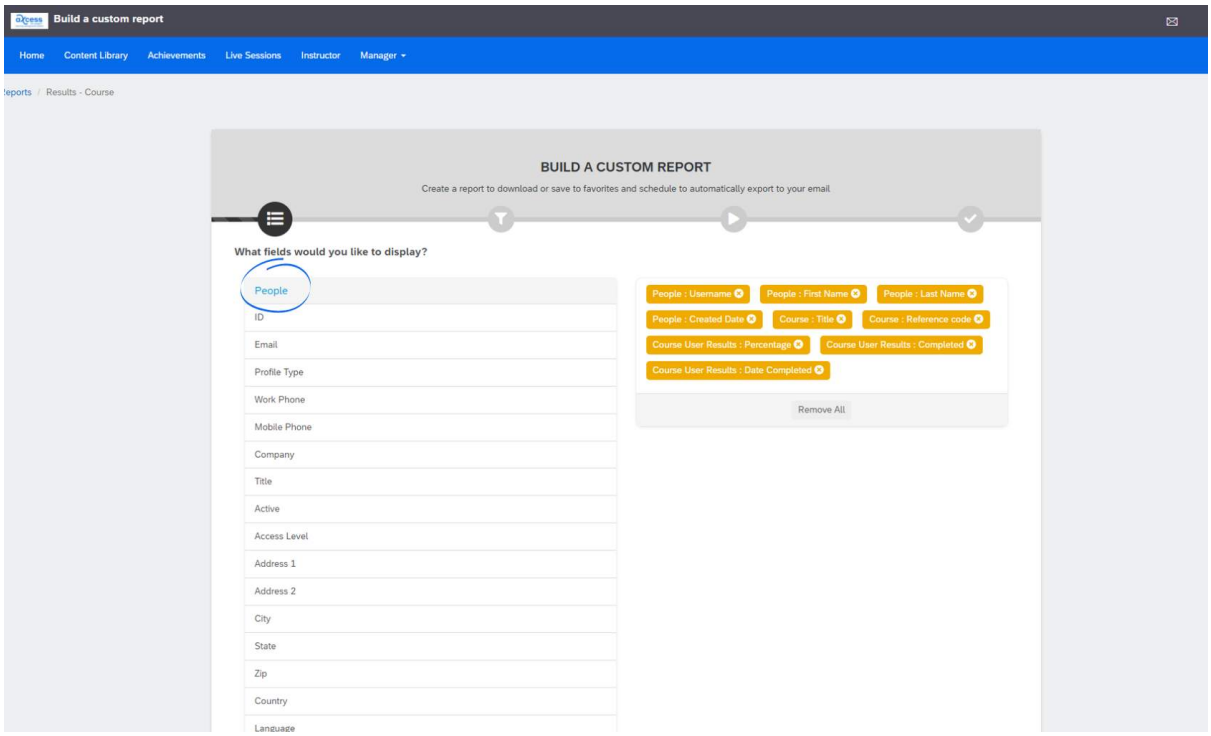


Everything on the right-hand side circled in black is your default columns that will display.

On the left-hand side circled in blue are the optional choices that you can add additional columns, you can click on the categories and select the information you need to view.

Step 4

Building a Report - People



After selecting on People Report, you will be taken to the screen, where you will be able to select the the columns you need on the report.

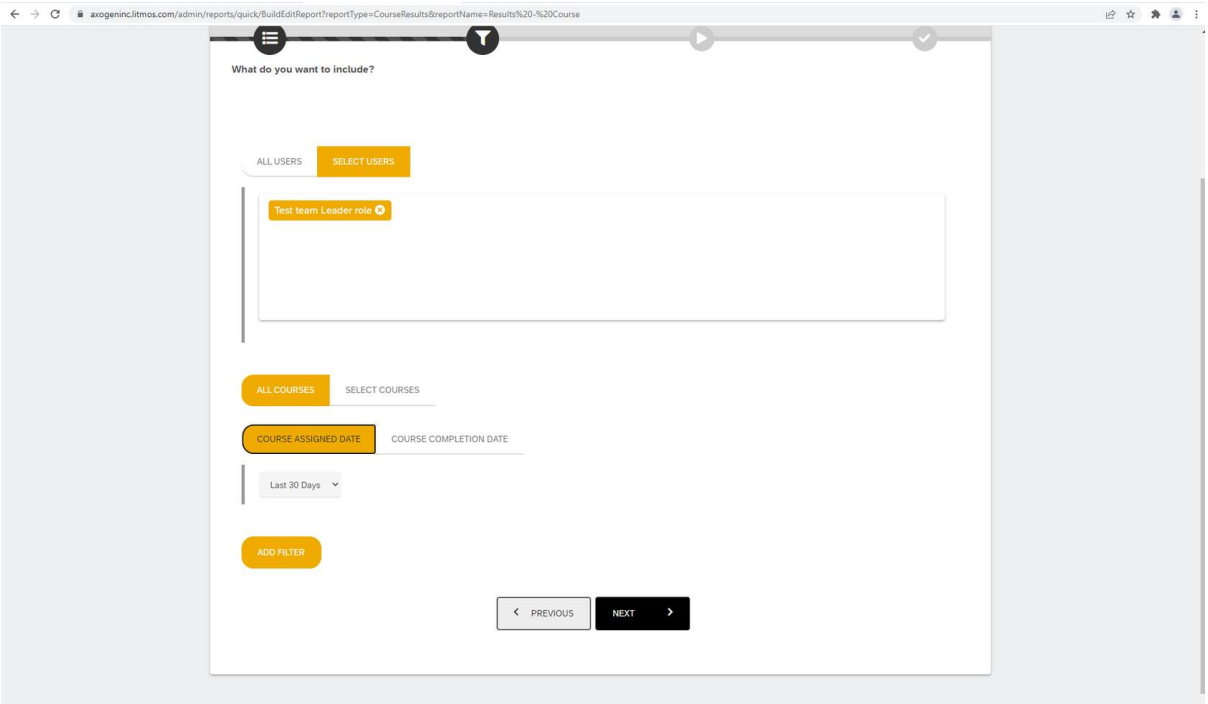
Using the options on the left hand side you can add specific information you want to see into the report.

Course is where you can select by ID, Total Ratings, Course Code, and more. If you choose all users , you will see your entire team, or you can select specific team members by name.

You can add to your report what courses users have in progress, assigned date, overdue, time taken, and more.

Step 5

Users for Report

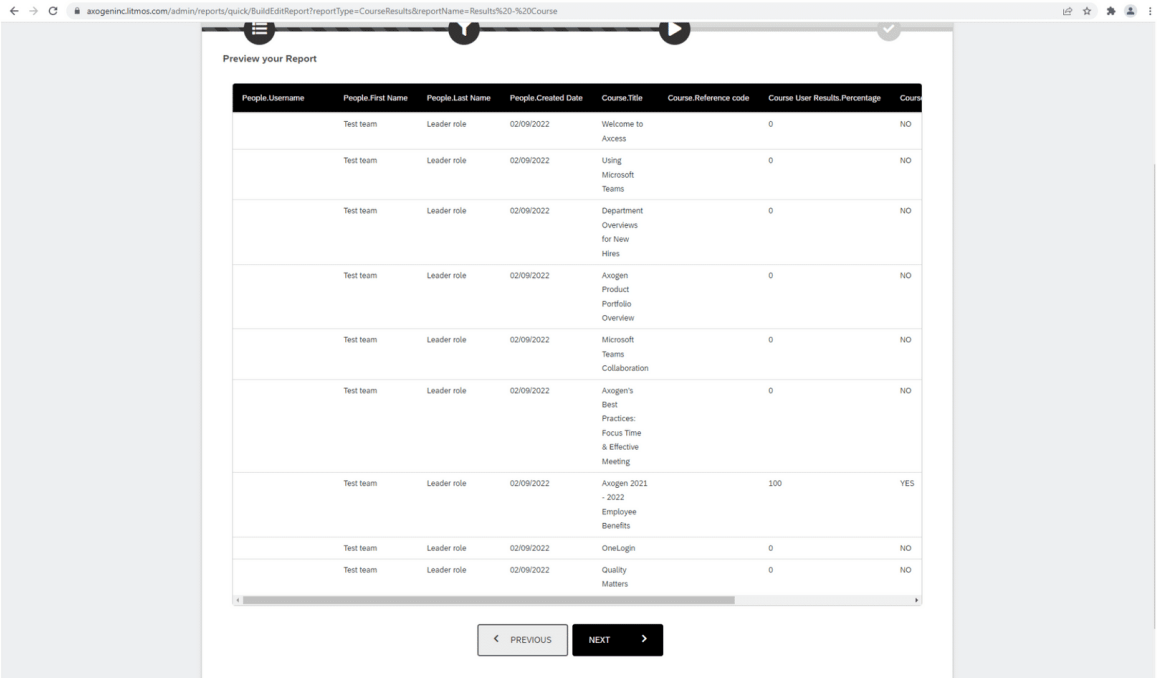


You can include all users, or select users, all courses, or select courses, course assigned date, or course completion date, and you are also able to change the frequency.

You will then select what user or all users for this report. If you click on select user a box will show up with everyone in your team and you will be able to click on the square. The square will have become blue with a white check mark in the middle. Then select add.

Step 6

Preview Report

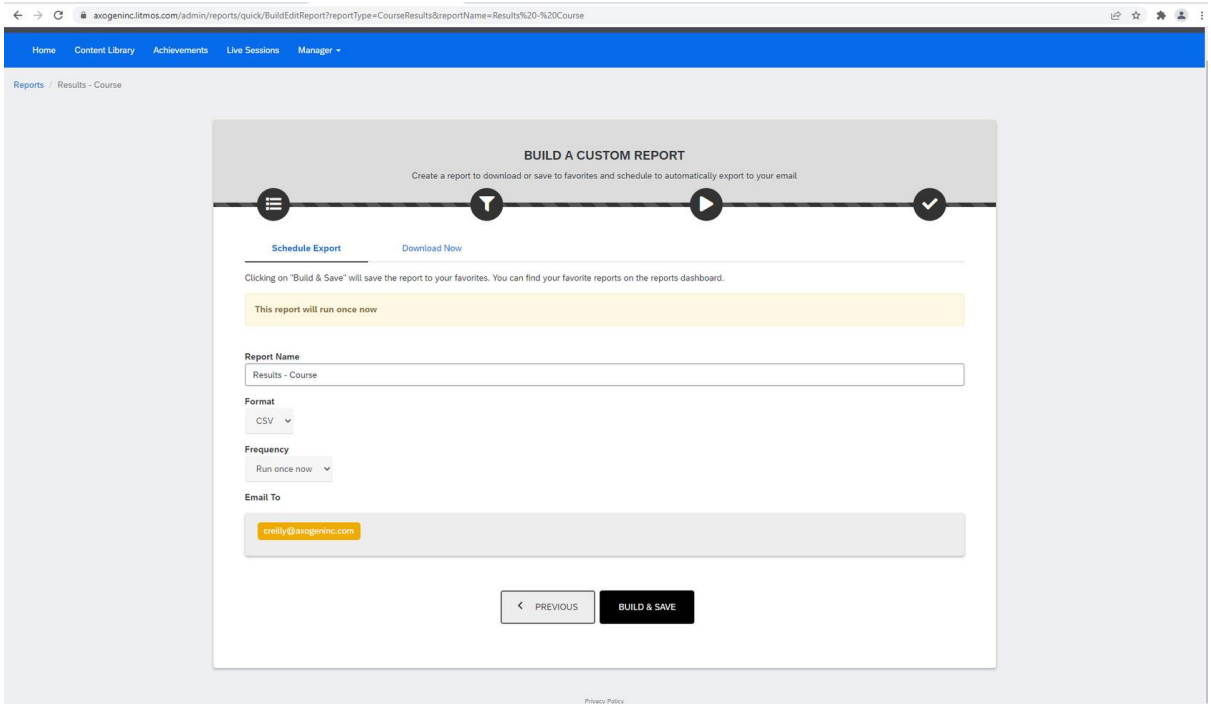


People.Username	People.First Name	People.Last Name	People.Created Date	Course.Title	Course.Reference code	Course User Results.Percentage	Cours
	Test team	Leader role	02/09/2022	Welcome to Axcess		0	NO
	Test team	Leader role	02/09/2022	Using Microsoft Teams		0	NO
	Test team	Leader role	02/09/2022	Department Overviews for New Hires		0	NO
	Test team	Leader role	02/09/2022	Axogen Product Portfolio Overview		0	NO
	Test team	Leader role	02/09/2022	Microsoft Teams Collaboration		0	NO
	Test team	Leader role	02/09/2022	Axogen's Best Practices: Focus Time & Effective Meeting		0	NO
	Test team	Leader role	02/09/2022	Axogen 2021 - 2022 Employee Benefits		100	YES
	Test team	Leader role	02/09/2022	OneLogin		0	NO
	Test team	Leader role	02/09/2022	Quality Matters		0	NO

You can now view a preview of the report to see what information will be in the report.

Step 7

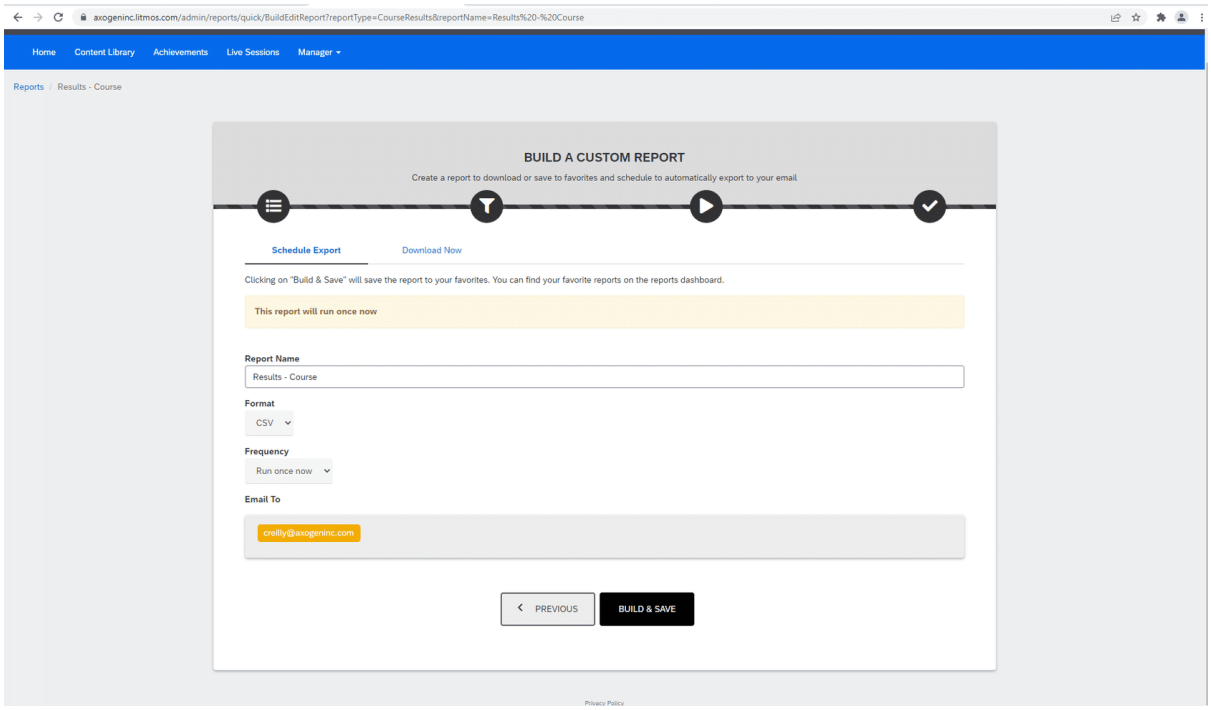
Schedule Report



You will now be able to rename your report, the format will be a CSV, and you can change the frequency with the drop down. This will also show you if it is sending to your email or you can download it now.

Step 8

Build & Save

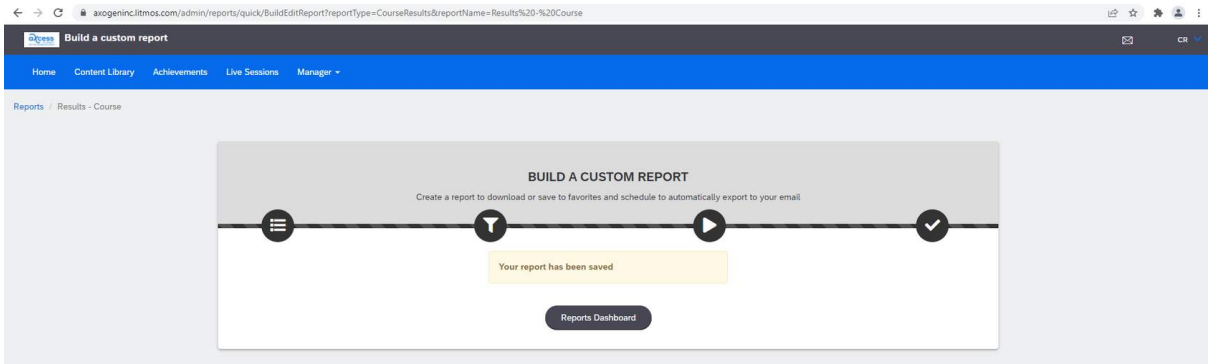


You are defaulted on the schedule report tab. You can change the title of the report, by typing the new title in the Report Name field. The format will be defaulted to CSV. Use the drop-down next to frequency to select how often you want to receive this report.

You now have the option to schedule the report to be sent to your email on a reoccurring basis or download now.

Step 9

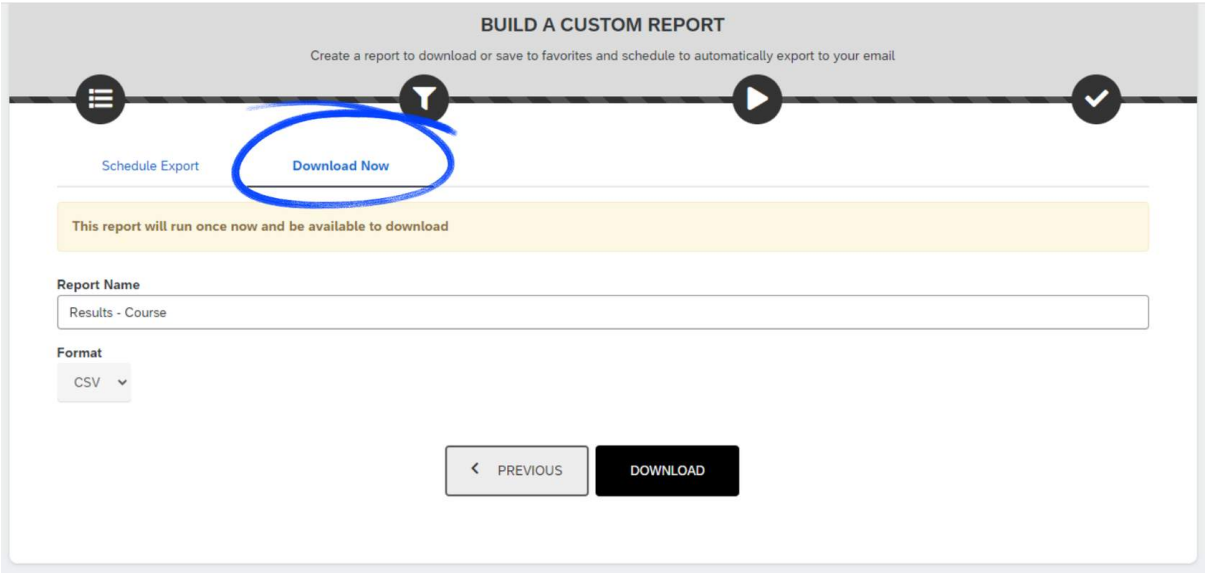
Report Saved



You will now see "Your report has been saved", it has either been downloaded or sent to your email depending on what you selected. You can then click back on Reports Dashboard to take you back to the beginning screen.

Step 10

Download Now

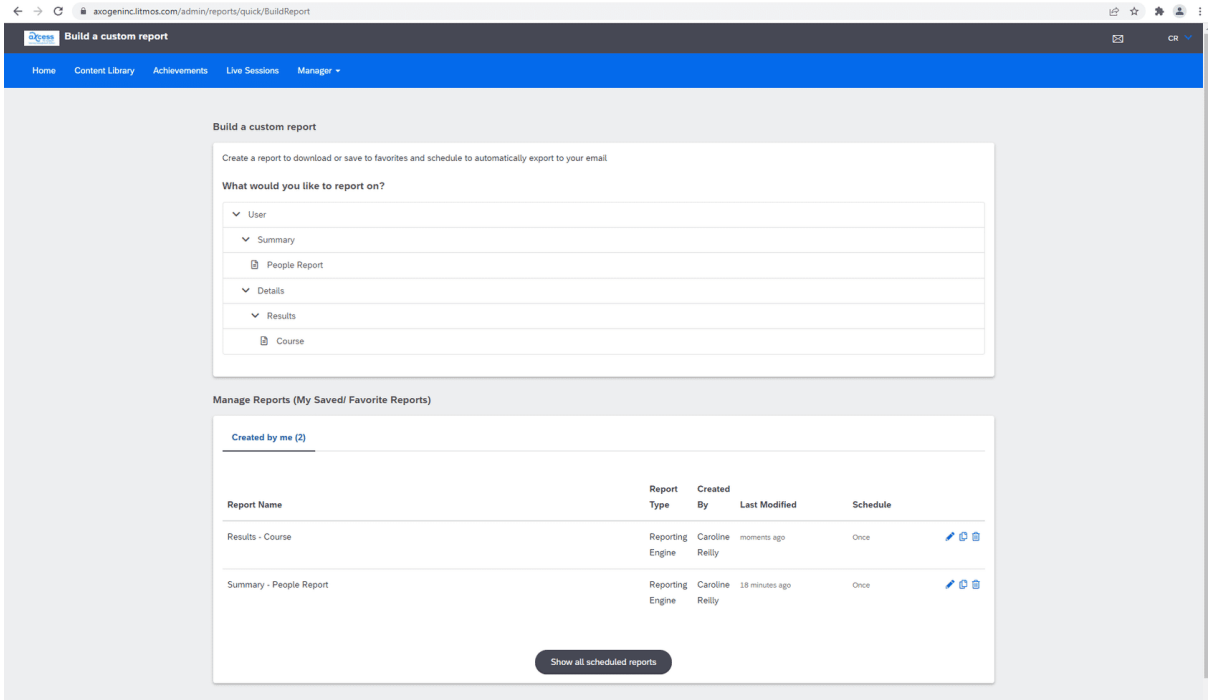


If you don't need to schedule a report, you can use the download now option. You can change the report name, and it automatically saves as a CSV file. Then click download.

After you have downloaded the report, you will have to click on the grey arrow to get the report.

Step 11

Saved Reports



You will now see in "Manage Reports (My Saved/ Favorite Reports)" the report that you just created.

Please note that if you have the report emailed to you the link that is sent will expire after 72 hours. You will see this text in the email along with the link to the report, "A report has been sent to you from the Litmos LMS.The above link expires after 72 hours".

Summary

You can now view the report in excel.

Tip: Don't forget to re-save the file as .xlsx or it will default to a csv file.

Complete the content above before moving on.

April has told you that she hasn't completed the Travel and Expense Policy course, what report in Axcess would you run?

- Select a User
- Run a User or Course Report

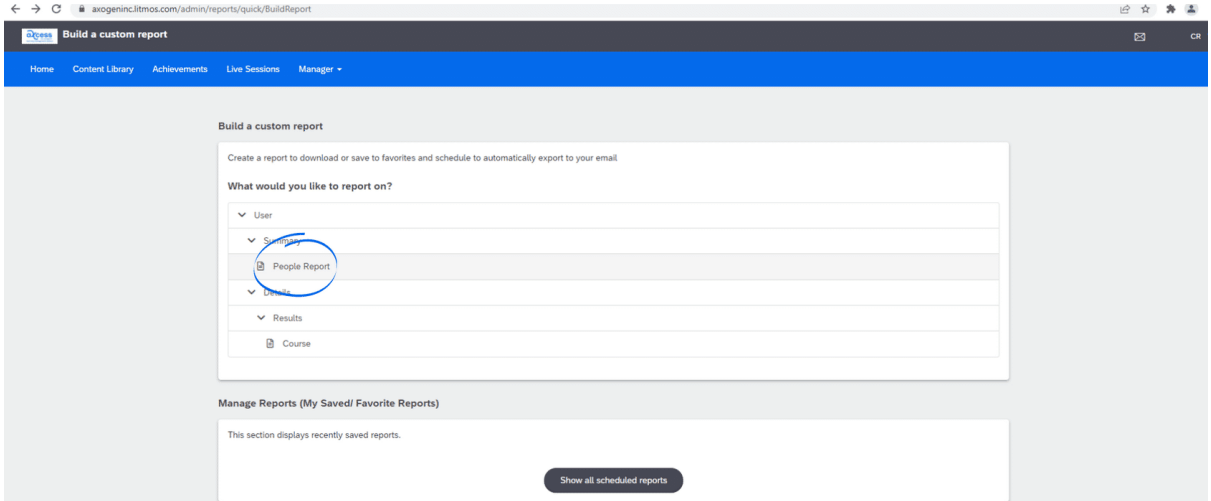
SUBMIT

Scheduling a Completion Progress Report for Required Courses

Select the start button to view the step-by-step instructions for running a report to quickly see who on your team has completed a required course.

Step 1

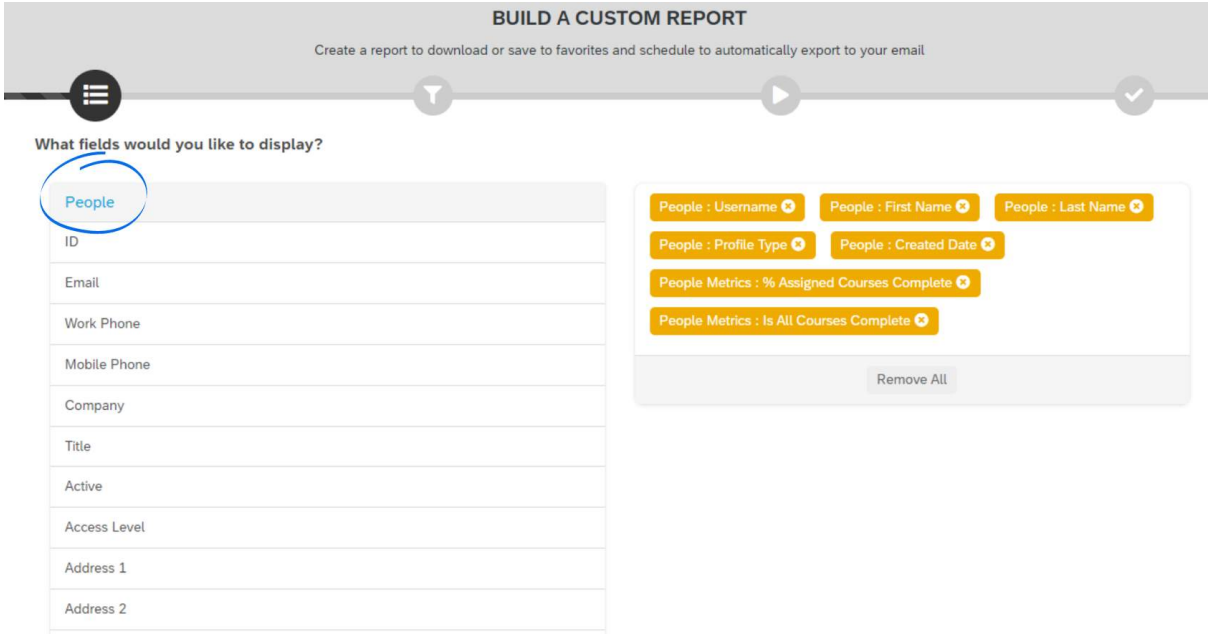
Building a Custom Report



On the screen select People Report.

Step 2

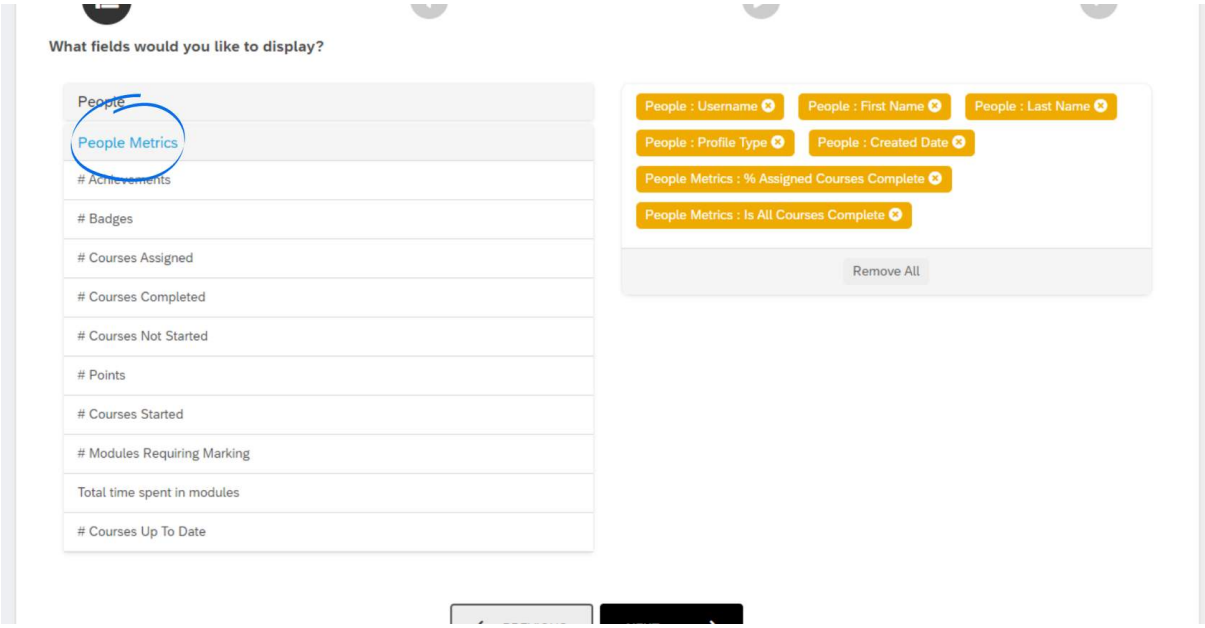
People



After selecting on People Report, you will be taken to the screen, where you will be able to select the the columns you need on the report.

Step 3

People Metrics



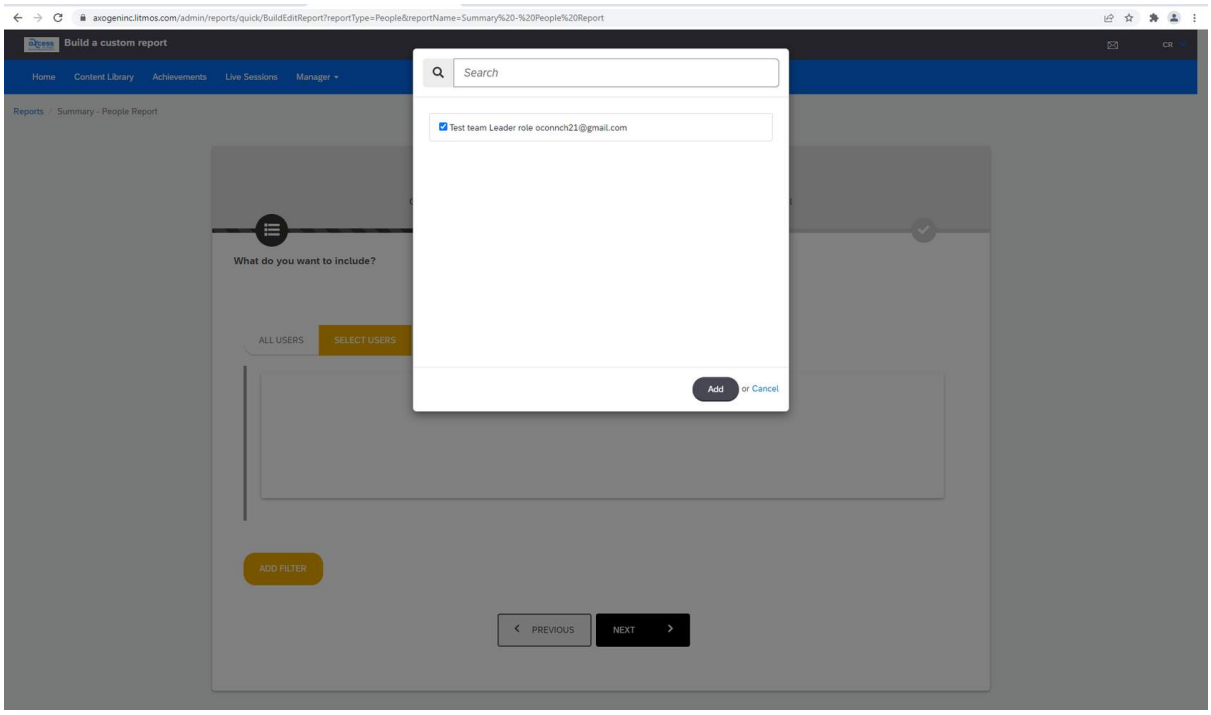
Then after you have selected the People, you can now click on People Metrics to build your report on.

People Metrics uses hashtags to search for Achievements, Badges, points, and more.

Once you have selected the people and people metrics, click next.

Step 4

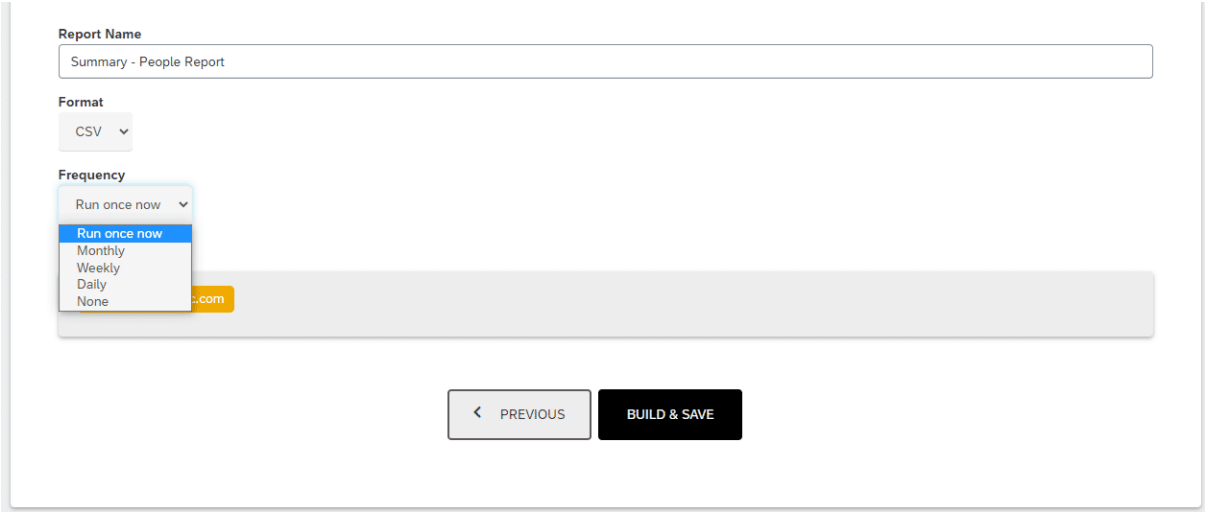
Select Users



On the next screen, you will be able to select all users or select users for specific reports. You will then select what user or all users for this report. If you click on select user a box will show up with everyone in your team and you will be able to click on the square. The square will have become blue with a white check mark in the middle. Then select add.

Step 5

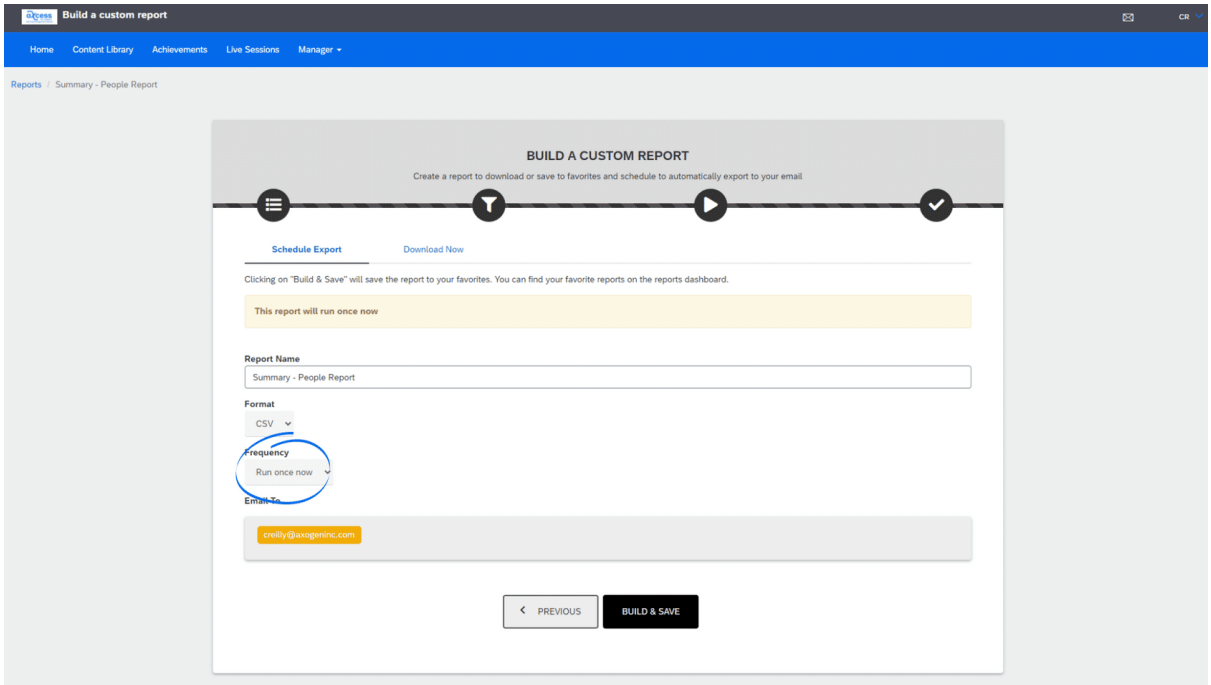
Frequency



You can change the frequency of when you run these reports from run once now, Monthly, Weekly, Daily, or none.

Step 6

Download Now



You will now be able to rename your report, the format will be a CSV, and you can change the frequency with the drop down. This will also show you if it is sending to your email or you can download it now.

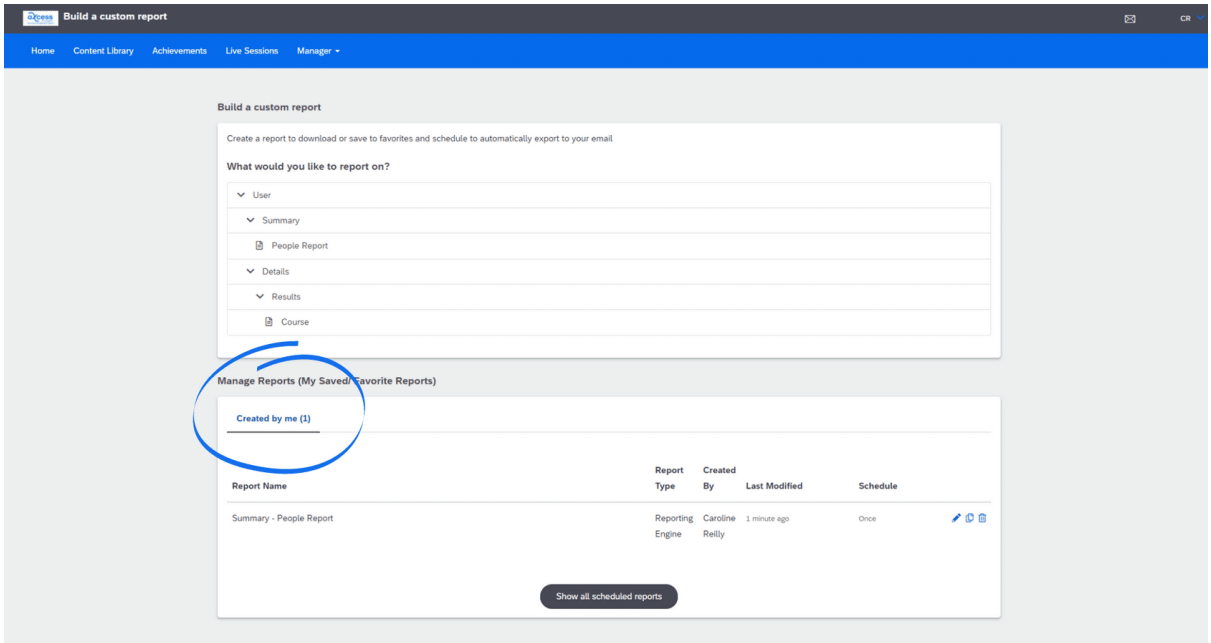
Hit the download button. When the report is ready to be downloaded you will see download icon.

After you have renamed your report, and changed the frequency to what you want it to run at, and made sure it is either being sent to your email or being downloaded now; click on Build & Save.

You will now see "Your report has been saved", it has either been downloaded or sent to your email depending on what you selected. You can then click back on Reports Dashboard to take you back to the beginning screen.

Step 7

Manage Reports



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Summary

You can view the report in excel.

Tip: Don't forget to re-save the file as .xlsx or it will default to a csv file.

Summary

To Conclude

Axcess is able to run reports give you the ability to view your direct reports training activity and completions. You can run different reports such as User Transcript Reports, Course / Learning Path Reports, and you can Build Your Own.

Patti Havens

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SEND EMAIL

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