A close-up photograph of a person's hands writing in a spiral-bound notebook. A white mug sits on a saucer to the left. The background is softly blurred, showing what appears to be an office or study environment.

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 Axxess

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

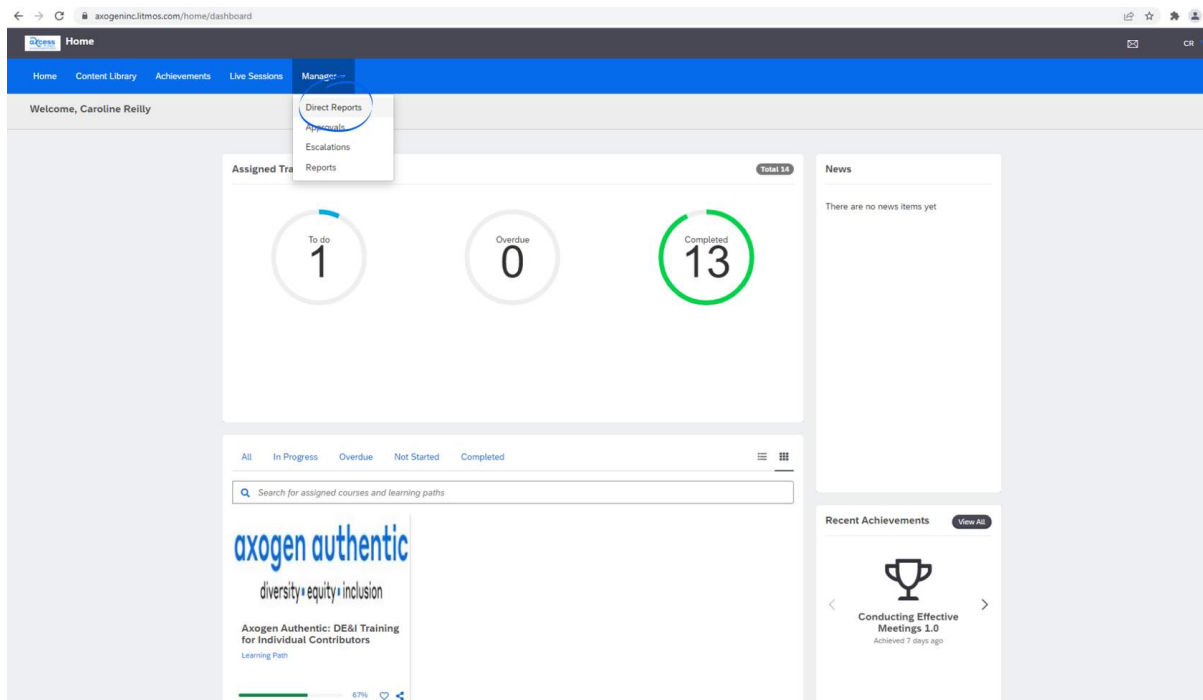
To quickly make sure your team is up-to-date on all required trainings select the manager drop down in the blue bar.

Viewing Direct Reports Training Transcripts

Click the Start button

Step 1

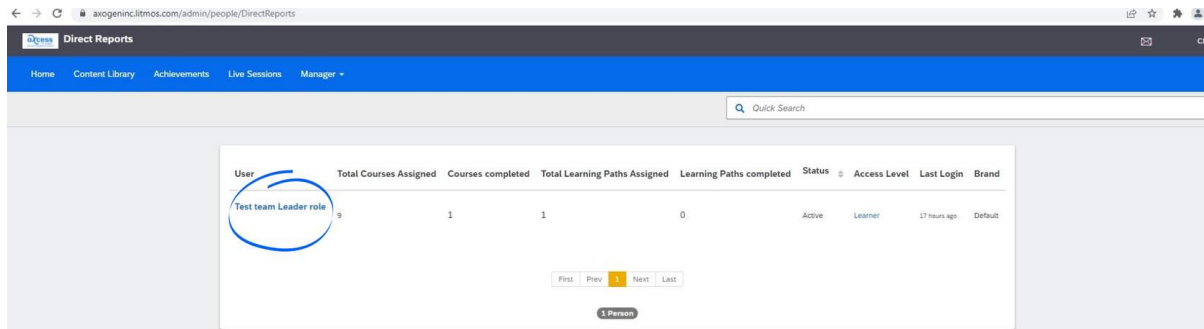
Select the manager tab



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

Step 2

Team Training Overview



User	Total Courses Assigned	Courses completed	Total Learning Paths Assigned	Learning Paths completed	Status	Access Level	Last Login	Brand
Test team Leader role	9	1	1	0	Active	Learner	17 hours ago	Default

First Prev Next Last

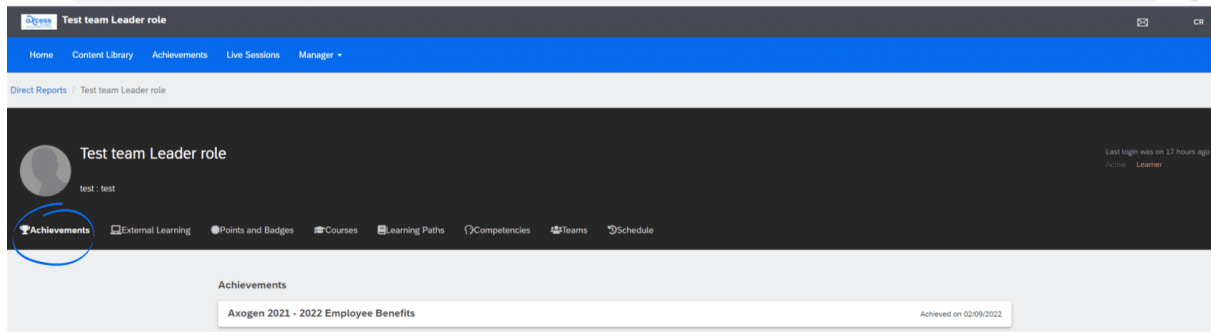
1 Person

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

The screenshot shows the Axogen LMS interface for a user with the role 'Test team Leader role'. The user's profile is visible at the top left, and the 'Courses' tab is highlighted in the navigation bar. Below the navigation bar, a list of 9 courses is displayed, each with its status, completion percentage, and a link to the learning path. The courses are:

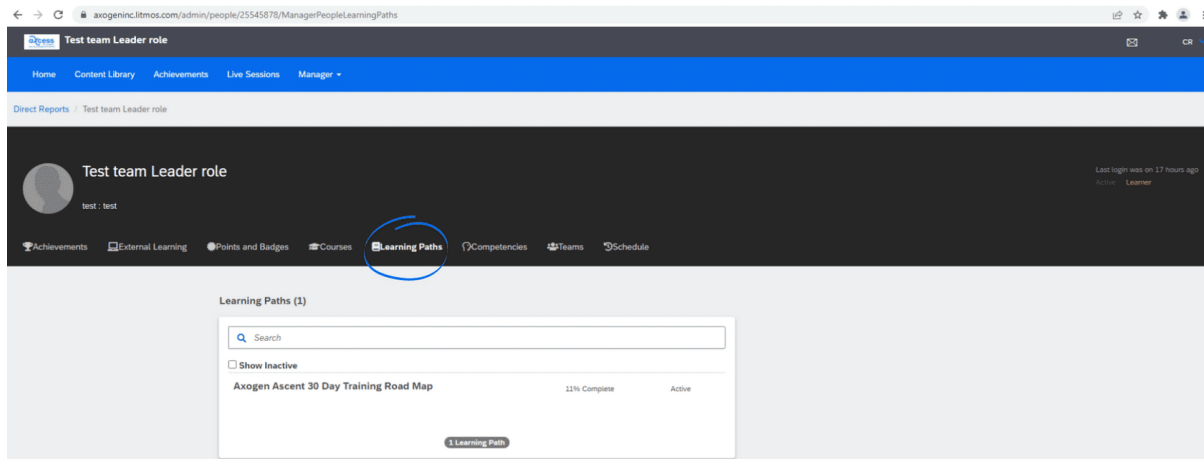
Course Name	Status	Completion	Due Date
Axogen 2021 - 2022 Employee Benefits	Active	100% Complete	
Axogen Product Portfolio Overview	Active	0% Complete	
Axogen's Best Practices: Focus Time & Effective Meeting	Active	0% Complete	
Department Overviews for New Hires	Active	0% Complete	
Microsoft Teams Collaboration	Active	0% Complete	Not Started and Due on Mar 11, 2022
OneLogin	Active	0% Complete	Not Started and Due on Mar 16, 2022
Quality Matters	Active	0% Complete	Not Started and Due on Feb 14, 2022
Using Microsoft Teams	Active	0% Complete	Not Started and Due on Mar 11, 2022

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



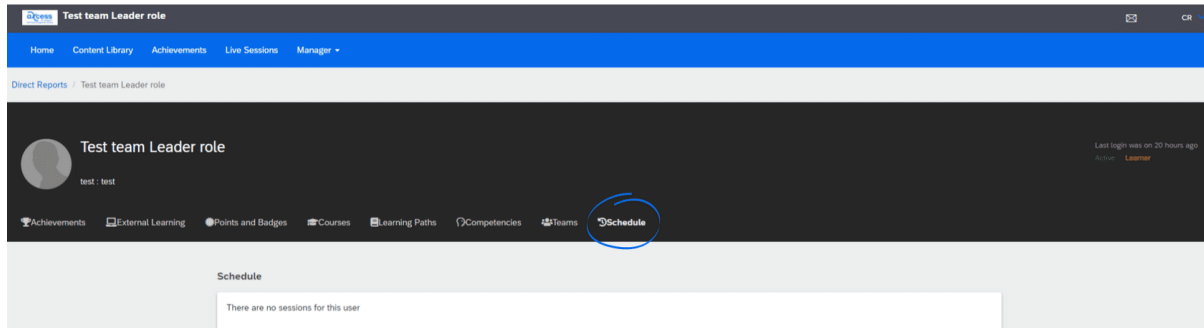
You will also be able to see the users Learning Paths. Learning Paths are multiple modules that have to be completed before the Learning Paths can be completed. This will also show how much has been completed by the user, and if the Learning Path is active or not.

An example of a Learning Path:

- Axogenic Leadership

Step 6

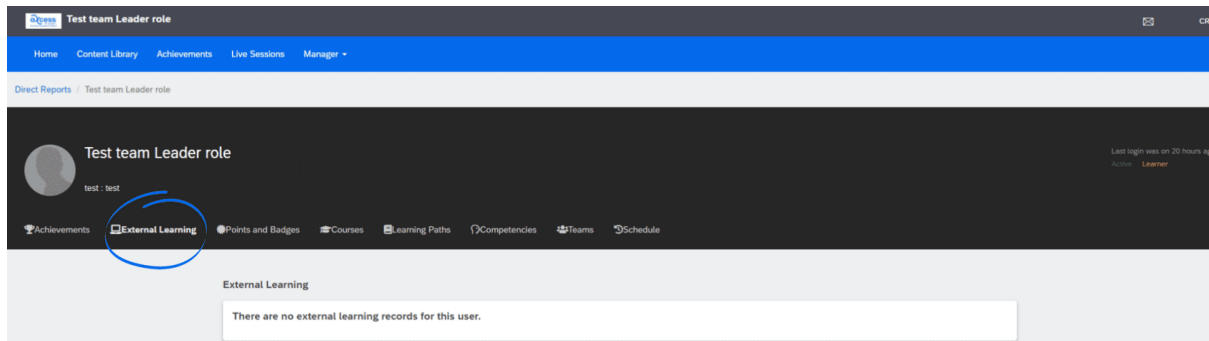
Schedule



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 Axxess.

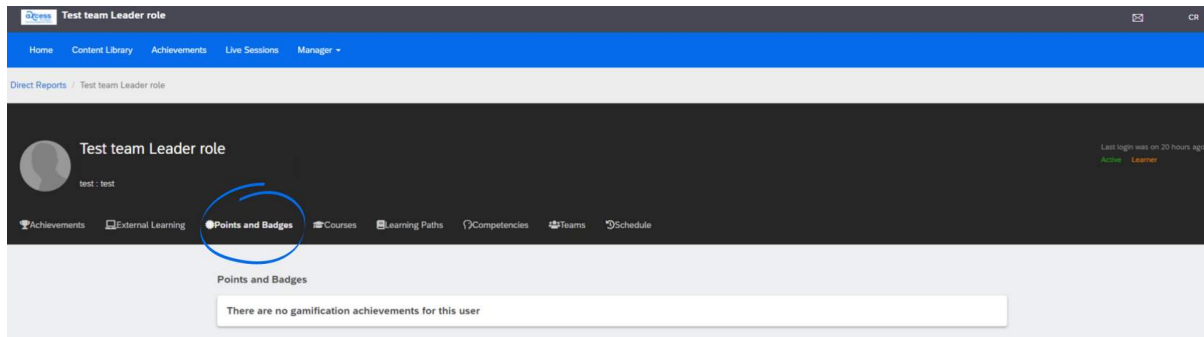
Tip: This information can then be used in your career progression conversations.

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 Axxess.
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 Axxess tab.



Course tab

Check to see if your direct report has completed 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 Axxess.

There are 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

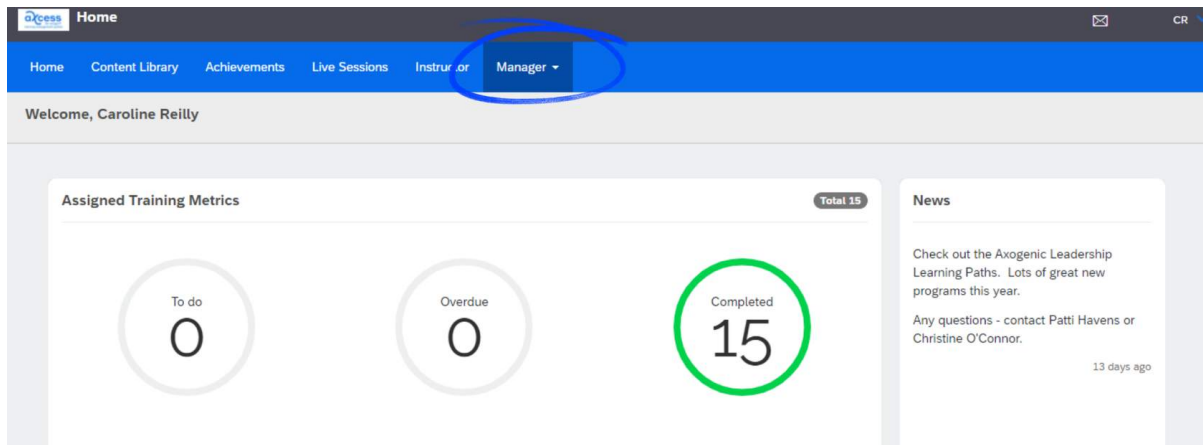
Create your own customized
report by selecting the
information you need to see.

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

Build a custom report

Create a report to download or save to favorites and schedule to automatically export to your email

What would you like to report on?

- User
- Summary
- People Report
- Details
- Results
- Course

Manage Reports (My Saved/ Favorite Reports)

Created by me (1)

Report Name	Report Type	Created By	Last Modified	Schedule	
Summary - People Report	Reporting Engine	Caroline Reilly	1 minute ago	Once	Edit Share Delete

Show all scheduled reports

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

BUILD A CUSTOM REPORT

Create a report to download or save to favorites and schedule to automatically export to your email

What fields would you like to display?

People
Course
Course User Results

People : Username
People : First Name
People : Last Name
People : Created Date
Course : Title
Course : Reference code
Course User Results : Percentage
Course User Results : Completed
Course User Results : Date Completed

Remove All

< PREVIOUS NEXT >

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

The screenshot shows the 'Build a custom report' interface. At the top, there's a navigation bar with links: Home, Content Library, Achievements, Live Sessions, Instructor, and Manager. Below this, a breadcrumb trail reads 'Reports / Results - Course'. The main heading is 'BUILD A CUSTOM REPORT' with a subtext: 'Create a report to download or save to favorites and schedule to automatically export to your email.' A progress bar with four steps is visible, with the first step (a menu icon) being the active one. Under the heading, the question 'What fields would you like to display?' is posed. On the left, a list of fields is shown, with 'People' circled in blue. The fields include: ID, Email, Profile Type, Work Phone, Mobile Phone, Company, Title, Active, Access Level, Address 1, Address 2, City, State, Zip, Country, and Language. On the right, a selection box contains several field cards: 'People : Username', 'People : First Name', 'People : Last Name', 'People : Created Date', 'Course : Title', 'Course : Reference code', 'Course User Results : Percentage', 'Course User Results : Completed', and 'Course User Results : Date Completed'. A 'Remove All' button is at the bottom of this selection box.

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

The screenshot shows a web browser window with the URL `avogence.itmos.com/admin/reports/quick/BuiltEditReport?reportType=CourseResults&reportName=Results%20-%20Course`. The page is titled "What do you want to include?" and features a progress bar at the top with four steps: 1. Select Users (active), 2. Select Courses, 3. Course Assigned Date, and 4. Course Completion Date. The main content area has two sections: "ALL USERS" and "SELECT USERS". The "SELECT USERS" section is active and shows a list of users with a search bar and a "Test team Leader role" button. Below this, there are tabs for "ALL COURSES" and "SELECT COURSES", and a section for "COURSE ASSIGNED DATE" and "COURSE COMPLETION DATE" with a "Last 30 Days" dropdown. At the bottom, there is an "ADD FILTER" button and "PREVIOUS" and "NEXT" navigation buttons.

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 7

Schedule Report

avogeninc.https.com/admin/reports/quick/BuildEditReport?reportType=CourseResults&reportName=Results%20-%20Course

Home Content Library Achievements Live Sessions Manager

Reports / Results - Course

BUILD A CUSTOM REPORT

Create a report to download or save to favorites and schedule to automatically export to your email.

Build Schedule Export Download Now

Clicking on "Build & Save" will save the report to your favorites. You can find your favorite reports on the reports dashboard.

This report will run once now

Report Name
Results - Course

Format
CSV

Frequency
Run once now

Email To
celly@avogeninc.com

PREVIOUS BUILD & SAVE

Privacy Policy

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

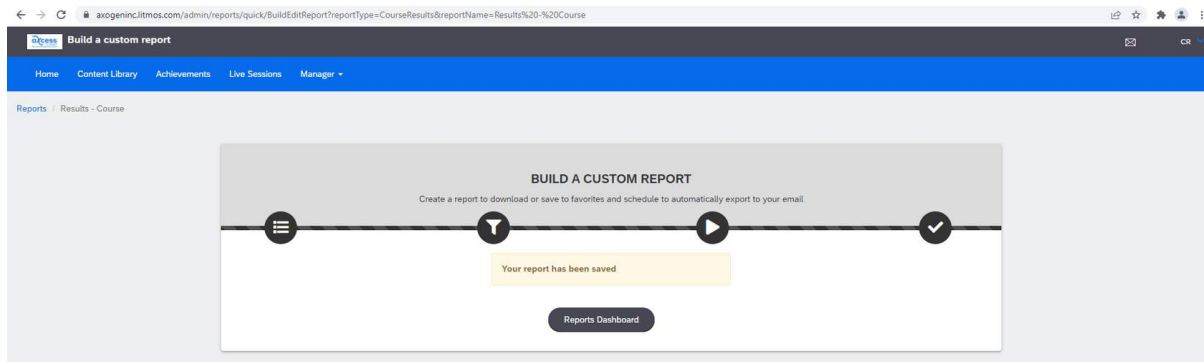
The screenshot shows a web browser window with the URL `avogenerinc.com/admin/reports/quick/BuildEditReport?reportType=CourseResults&reportName=Results%20-%20Course`. The page has a blue header with navigation links: Home, Content Library, Achievements, Live Sessions, and Manager. Below the header, the breadcrumb trail reads 'Reports / Results - Course'. The main content area is titled 'BUILD A CUSTOM REPORT' with the subtitle 'Create a report to download or save to favorites and schedule to automatically export to your email'. A progress bar with four steps (list, funnel, play, checkmark) is shown, with the third step (play) being the active one. Below the progress bar, there are two tabs: 'Schedule Export' (selected) and 'Download Now'. A message states: 'Clicking on "Build & Save" will save the report to your favorites. You can find your favorite reports on the reports dashboard.' Below this, a yellow box says 'This report will run once now'. The form fields are: 'Report Name' (containing 'Results - Course'), 'Format' (dropdown menu set to 'CSV'), 'Frequency' (dropdown menu set to 'Run once now'), and 'Email To' (containing 'celia@avogenerinc.com'). At the bottom, there are two buttons: 'PREVIOUS' and '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

The screenshot shows a web interface titled "BUILD A CUSTOM REPORT" with the subtitle "Create a report to download or save to favorites and schedule to automatically export to your email". A progress bar at the top has four icons: a menu icon, a download icon (circled in blue), a play icon, and a checkmark icon. Below the progress bar, there are two options: "Schedule Export" and "Download Now" (circled in blue). A yellow banner below these options states "This report will run once now and be available to download". Underneath, there is a "Report Name" field containing "Results - Course" and a "Format" dropdown menu set to "CSV". At the bottom, there are two buttons: "PREVIOUS" and "DOWNLOAD".

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

The screenshot shows the Litmos LMS interface. At the top, there's a navigation bar with 'Home', 'Content Library', 'Achievements', 'Live Sessions', and 'Manager'. The main heading is 'Build a custom report'. Below this, there's a section titled 'What would you like to report on?' with a list of options: User, Summary, People Report, Details, Results, and Course. The 'Results' option is selected. Below this, there's a section titled 'Manage Reports (My Saved/ Favorite Reports)'. It shows a table of reports created by the user. The table has columns for Report Name, Report Type, Created By, Last Modified, and Schedule. There are two reports listed: 'Results - Course' and 'Summary - People Report'. Both reports are of type 'Reporting Engine', created by 'Caroline Reilly', and scheduled to run 'Once'. A button at the bottom of the table says 'Show all scheduled reports'.

Report Name	Report Type	Created By	Last Modified	Schedule
Results - Course	Reporting Engine	Caroline Reilly	moments ago	Once
Summary - People Report	Reporting Engine	Caroline Reilly	18 minutes ago	Once

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 Axxess would you run?

☐

Select a User

☐

Run a User or Course Report

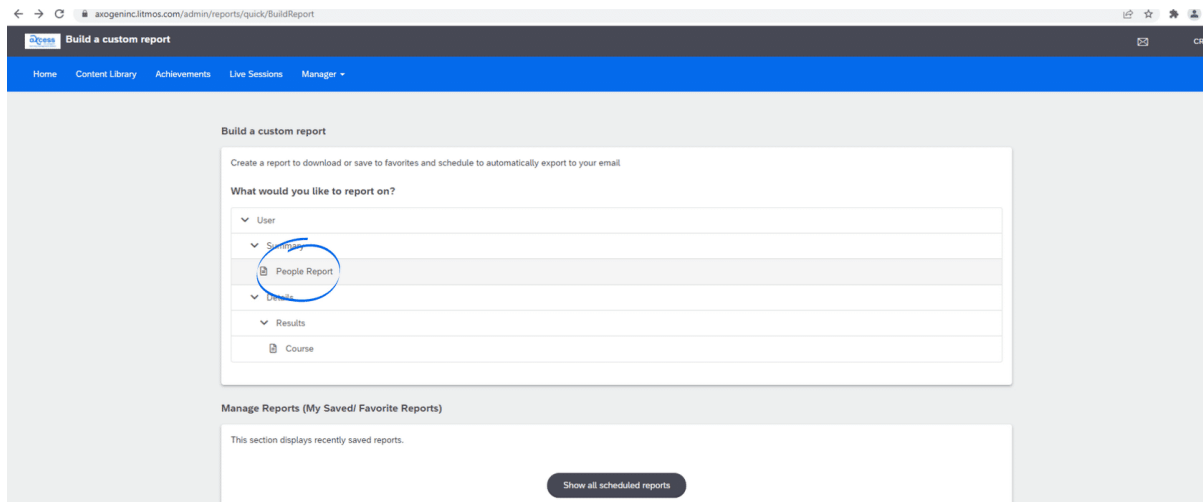
SUBMIT

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

BUILD A CUSTOM REPORT
Create a report to download or save to favorites and schedule to automatically export to your email



What fields would you like to display?

People

ID
Email
Work Phone
Mobile Phone
Company
Title
Active
Access Level
Address 1
Address 2

People : Username

People : First Name

People : Last Name

People : Profile Type

People : Created Date

People Metrics : % Assigned Courses Complete

People Metrics : Is All Courses Complete

Remove All

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

What fields would you like to display?

People

People Metrics

Achievements

Badges

Courses Assigned

Courses Completed

Courses Not Started

Points

Courses Started

Modules Requiring Marking

Total time spent in modules

Courses Up To Date

People : Username

People : First Name

People : Last Name

People : Profile Type

People : Created Date

People Metrics : % Assigned Courses Complete

People Metrics : Is All Courses Complete

Remove All

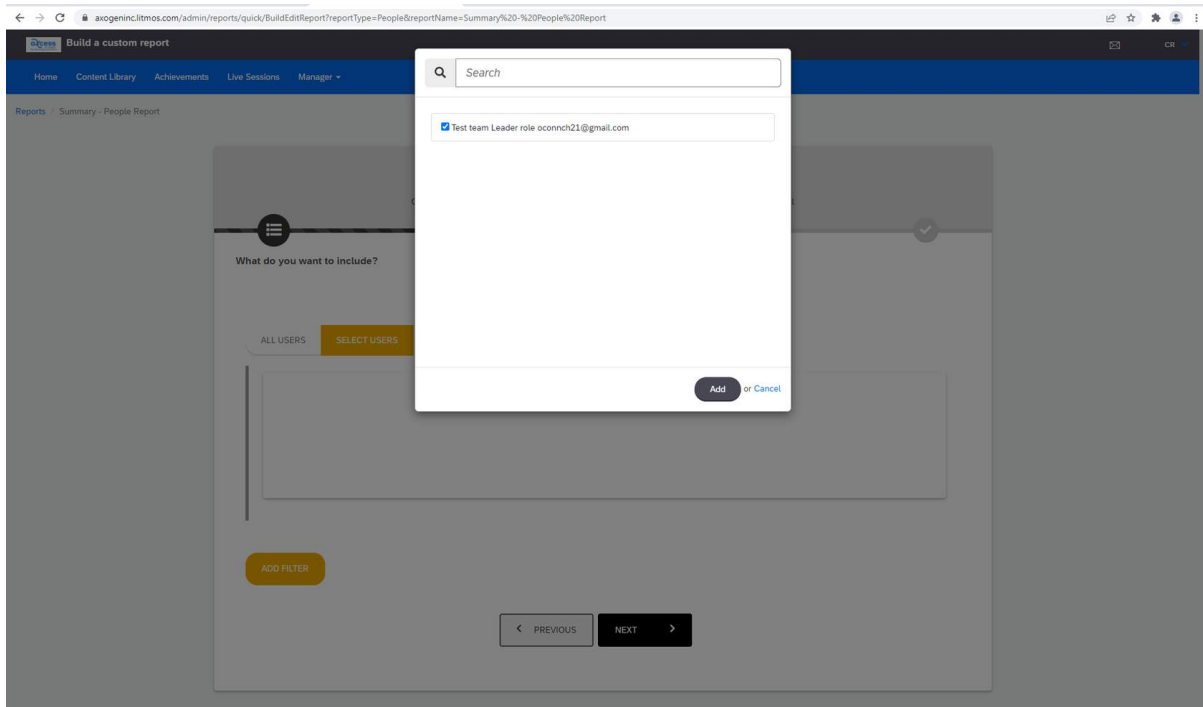
Then after you have selected the People, you can now click on People Metrics to build your report on.

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

Report Name

Summary - People Report

Format

CSV

Frequency

Run once now

Run once now

Monthly

Weekly

Daily

None

PREVIOUS BUILD & SAVE

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

Step 6

Download Now

The screenshot shows a web application interface for building a custom report. The title bar at the top says "Build a custom report". Below it is a navigation bar with links: Home, Content Library, Achievements, Live Sessions, and Manager. The main content area has a breadcrumb trail: Reports / Summary - People Report. The central panel is titled "BUILD A CUSTOM REPORT" and includes a sub-header: "Create a report to download or save to favorites and schedule to automatically export to your email". There are four circular icons in a row: a menu icon, a play icon, a download icon, and a checkmark icon. Below these icons are two tabs: "Schedule Export" (active) and "Download Now". A yellow box states: "Clicking on 'Build & Save' will save the report to your favorites. You can find your favorite reports on the reports dashboard." Below this, another yellow box says: "This report will run once now". The form fields include: "Report Name" (text input with "Summary - People Report"), "Format" (dropdown menu with "CSV" selected), "Frequency" (dropdown menu with "Run once now" selected, circled in blue), and "Email to" (text input with "celia@axogeninc.com"). At the bottom are two buttons: "PREVIOUS" and "BUILD & SAVE" (highlighted in black).

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

The screenshot shows the 'Build a custom report' page in the Litmos LMS. The page has a blue header with navigation links: Home, Content Library, Achievements, Live Sessions, and Manager. The main content area is titled 'Build a custom report' and includes a sub-header 'Create a report to download or save to favorites and schedule to automatically export to your email'. Below this is a form titled 'What would you like to report on?' with sections for User, Summary, People Report, Details, Results, and Course. A blue circle highlights the 'Created by me (1)' link in the 'Manage Reports (My Saved/ Favorite Reports)' section. Below this link is a table of saved reports.

Report Name	Report Type	Created By	Last Modified	Schedule	
Summary - People Report	Reporting Engine	Caroline Reilly	1 minute ago	Once	Edit Share Delete

At the bottom of the table is a button labeled 'Show all scheduled 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 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

Director, Organization Effectiveness and Talent Development

SEND EMAIL

Christine O'Connor

Organization Effectiveness and Talent Development Partner

SEND EMAIL