

MyTrack Reports for Learning Admins

MyTrack Legacy Reports provide useful reporting data about MyTrack training sessions, participants, enrollment, and compliance. This includes rosters, sign-in sheets, contact information, unit and supervisory information, position title and type, completion status, withdrawal status, and the ability to see attendance for multiple sessions at a time.

The two primary reports Learning Administrators use most are Rosters and Attendees Lists. This guide will cover how to run one of each, with information on specific settings, options, and filters.

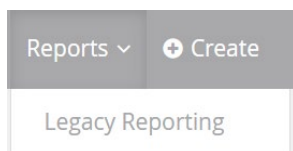
Attendees Lists

Attendees Lists are the most robust reporting tool currently offered in MyTrack. They allow you to pull data for past, present, and future sessions. Information on Attendees Lists includes first name, last name, preferred name, e-mail, position, school/college/administrative unit, VP area, and role. This report also includes filters for activity status, withdraw status, completion date, timeslot, activity code, and more.

While Roster reports generate a sign-in sheet, Attendees Lists allow more customization options beyond the fields listed above and can be edited in Excel to create custom sign-in sheets and rosters. Attendees Lists also allow more options for including multiple courses or timeslots in one report.

Running an Attendees List

1. In MyTrack, select the Legacy Reporting option in the Reports menu. This will open a Reporting hub with several report options.



2. For customizable information on a training session, select Attendees Lists – Learning Administrators.



3. A pop-up window will launch with report filters – if you use a pop-up blocker, you may need to disable it while using the reporting function.

The screenshot displays the 'Attendees List - Learning Administrators' report filter interface. The filters are as follows:

Field	Operator	Value	Or	Value	Actions	
Employee Archived	Equals	No	+	Yes	x	Eye, Refresh
Development activity WITHDRAWN	Equals	No	+	Yes	x	Eye, Refresh
Development activity Activity status	Equals	Complete	+	Booked	x	Eye, Refresh
Development activity Title	Equals	New Employee Orientation Prc	+			Eye, Refresh
Development activity Code	Equals	Enter the code or click eye icon	+			Eye, Refresh
Events Timeslot	Equals	5 Oct 2021				Calendar, Eye, Refresh

Filters

Employee: Archived – This filter is for inclusion of employees who are no longer active at UO, it is not typically used and can be marked “ignored”

- Example: Safety and Risk Services might need to run a report for everyone who attended Fire Safety Training for the whole year, including employees who are no longer active at UO

Development Activity: Withdrawn – This filter indicates whether or not an employee has withdrawn from an activity. It can be used to filter a list to show only withdrawn or not withdrawn. withdrawn employees from the list.

- In the example, the report will include an indication of whether an employee has or has not withdrawn from the selected session. To prevent withdrawn participants from showing on the report, select “Equals” and “No.” This means the report will only show participants whose

withdraw status equals no. To show only withdrawn participants for a session, select “Equals” and “Yes.”

Development Activity: Activity Status – This filter generates a list of employees who match the specified status types. If you would like to see all employees of any status type, set this filter to Ignore.

- In the example above, any employee who is in Booked or Complete status will appear on your list. Employees in other statuses (eg. In Progress) will not show up.

Development Activity: Title – Enter the title of the activity you are generating the report for.

- This field requires the exact title or it won't generate data – begin typing the session name, then select it from the drop down that appears. If it doesn't appear in the drop down, check the Learning Library for the correct course title.

Development Activity: Code – Codes are managed by Learning & Development – most activities do not have codes and you can set this filter to Ignore.

- Codes can add value in your reporting by allowing you to pull together multiple data points. Examples of code uses: If there is a series of courses within a program and you would like to generate a report for without setting up every title, we can set up a code. We can also set up a code for all the trainings that a particular person leads, and have an automated report sent to them weekly or monthly.

Events: Timeslot – Pulls report from timeslot(s) you specify here. In the example, the report will generate information from the activity that took place on October 5, 2021 only. You can also choose a date range such as 'last year' or 'last month' or 'next quarter' to generate data from sessions offered multiple times.

- This field does not work with e-learning courses – if you are trying to generate a report of e-learning participants, set this filter to Ignore.

Notes About Filters

Once you set filters, those settings will remain in place every time you access this screen unless you manually change them. This allows you to customize a report the way you'd like, then have those customizations saved every time you run it.

The use of “Equal” in the Filter options means results that are equal to/match the criteria you specify will appear. For example, if you choose Withdraw > Equals > No, you will only see participants who have not withdrawn from an Activity. Any participants who did withdraw will not be included on your list.

Remember, you can't “break” the reporting system, so feel free to experiment with different filter options until you find the ones that work best for you.

Filter Buttons



The eye icon indicates whether a filter is visible or ignored. When the icon has a slash through it, the filter is being ignored for your report.



The refresh icon will refresh the fields in that section.

- Once you've adjusted the filters to the settings you'd like, select the Save & View button at the top right of the screen.



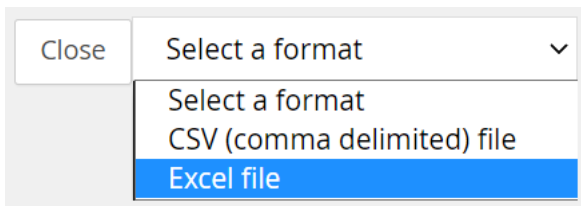
This will generate a pop-up window with reporting information.

Attendees List - Learning Administrators						
Timeslot	Count (Timeslot)	First name	Last name	E-mail	Position	School/College/Admin Unit
Oct 5 2021 9:30AM	37.00					

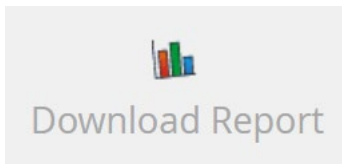
Close Select a format

Note: If you click the + sign under the Timeslot column, you can see a preview of the reporting data

- From the drop down menu, select "Excel file" then click the Export button



- Once the report is finished generating, a Download Report link will appear



Click Download Report. The report will download in your browser, and you will see it listed in the lower left corner of the browser window.

7. Click on the file name, or select “Open” from the ^ menu. If you accidentally close the browser window prior to opening, you can also find the file on your computer in the Downloads folder.



8. Once your report has opened in Excel, click the ‘Enable Editing’ button at the top of the Excel screen. You can modify or sort the data in Excel to achieve the design that best suits your needs.

Rosters

Rosters generate an Excel report that includes a Data sheet and a Sign In sheet for a specific training session and are intended for sessions that have not yet occurred. These reports have limited customization options and are primarily used to create pre-filled Sign In sheets for taking training attendance.

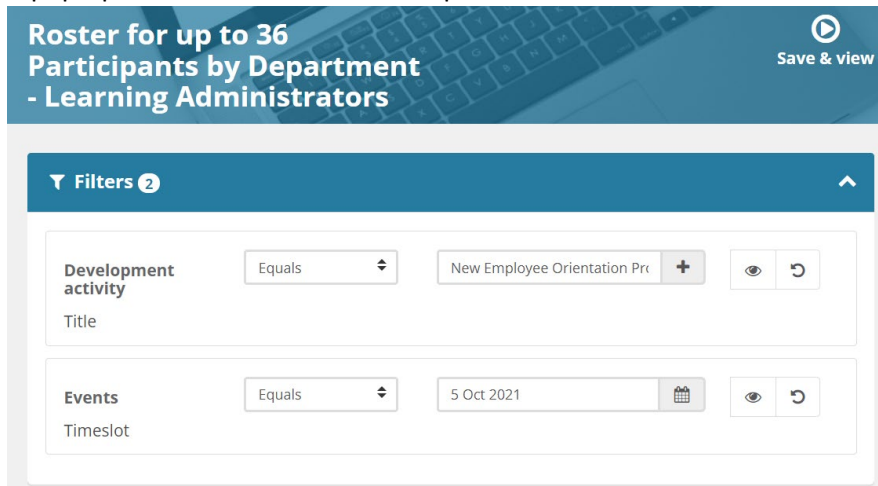
This report is a great way to get an updated attendance sheet that reflects last minute changes to the roster. There are currently 4 options, please note the limit on participant numbers when generating the roster. If you need to create a Sign In sheet for a session that has more than 111 participants, you can use the Attendees List and modify the Excel report to use as a Sign In sheet.

Running a Roster

1. From the Reports hub, select the Roster report that best fits your needs. For this example, we will be using ‘Roster for up to 36 Participants by Department – Learning Administrators’



2. A pop-up window will launch with report filter



Filters

Development Activity: Title – Enter the title of the activity you are generating the report for.

- This field requires the exact title or it won't generate data – begin typing the session name, then select it from the drop down that appears. If it doesn't appear in the drop down, check the Learning Library for the correct course title.

Events: Timeslot – Pulls report from timeslot you specify here. The formatting on the date field is case and order sensitive. If you receive an error message, try using the calendar icon to select the date.

Filter Buttons



The eye icon indicates whether a filter is visible or ignored. When the icon has a slash through it, the filter is being ignored for your report.



The refresh icon will refresh the fields in that section.

3. Once you've adjusted the filters to the settings you'd like, select the Save & View button at the top right of the screen.

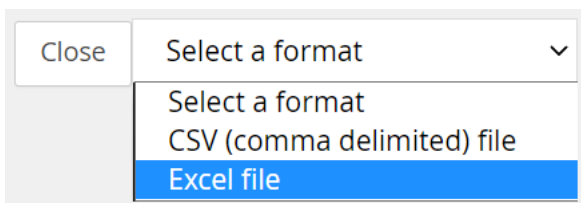


This will generate a pop-up window with reporting information.

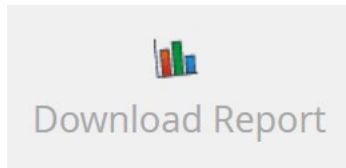
Roster for up to 36 Participants by Department - Learning Administrators									
Title	Count (Title)	Timeslot	First name	Last name	Duck ID	E-mail	Position	School/College/Admin	
[-] New Employee Orientation Program: YOU & UO	22.00								
[+] Nov 2 2021 9:30AM									
						Close	Select a format ▼		

Note: If you click the + sign under the Timeslot column, you can see a preview of the reporting data

4. From the drop down menu, select "Excel file" then click the Export button

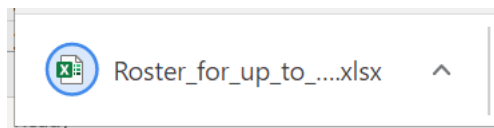


5. Once the report is finished generating, a Download Report link will appear



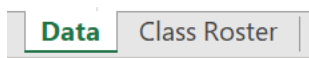
Click Download Report. The report will download in your browser, and you will see it listed in the lower left corner of the browser window.

6. Click on the file name, or select "Open" from the ^ menu. If you accidentally close the browser window prior to opening, you can also find the file on your computer in the Downloads folder.



7. Once your report has opened in Excel, click the 'Enable Editing' button at the top of the Excel screen. You can modify or sort the data in Excel to achieve the design that best suits your needs.

In the first tab, labeled "Data" you will have detailed information on participants. In the second tab, labeled "Class Roster" you will have a sign-in sheet ready to print.



Troubleshooting

My report isn't generating any information

1. Check your filters
2. Check your Activity Title – this must be selected from the drop down list that generates as you begin typing the name, or nothing will be retrieved.
3. Check your dates and activity type. If an activity type is e-learning, you must mark the date filter to "Ignore" in order to generate data.

I hit Save & View and nothing happens

1. Check your pop-up blocker. Pop-up blockers may prevent the reporting window from opening
2. Check your browser – we recommend Chrome for MyTrack reporting

I hit Download Report and nothing happens

1. Check the bottom left corner of your screen for the file name

2. Check your browser downloads. In Chrome you can do this by selecting the three stacked dots in the upper right corner of the screen, then selecting Downloads

