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EMPLOYEE SERVICES

Percipio Administrator's Reporting Guide

This guide describes how to run reports in Skillsoft Percipio. Although a mobile app is available for Percipio, Admin actions cannot be completed through the app and can only be completed on the web platform.

The following terms are relevant when running reports in Percipio:

- **Username** – A constituent ID (CIS) is a unique, universal identifier that comes from Master Data Management (MDM). This lets various CU technologies identify and authenticate CU employees and students.
- **HR EmplID** – A six-digit ID number assigned to employees and persons of interest (POIs) at CU in HCM.
- **CS EmplID** – A nine-digit ID number assigned to all students at CU in Campus Solutions.

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Running a Report

In Percipio, you use a template to create the report you want to run. Templates are forms that let you determine the dates, filter options, and display options to be included in report results. Percipio provides pre-defined templates that you can customize and save as personal templates. You can run reports as needed or you can schedule them to run automatically. Reports are available for 14 days from successful generation and then will be automatically deleted from Percipio.

You access the list of reports from the **Analytics** menu. The Analytics page lets you access a list of all the reports available, view dashboards, select a specific report template, or access the report downloads tab.

Note: The Analytics page may have fewer options depending on your security access.

Dashboards provide metrics related to user activity within Percipio and the status of key operational functions. For a detailed explanation of the data listed in each dashboard, go to https://documentation.skillsoft.com/en_us/percipio/Content/A_Administrator/admn_dashboards.htm.

Use the following tabs when running reports:

- **All reports** - Lists all available reports, along with their type, description, and other useful information.
  - **Standard reports** - These reports show up-to-the-minute data and go back 24 months. Use these reports when you want to check active logins or completions. You cannot save a customized view of this report, but you can download and share it.
  - **Skillsoft templates** - These reports contain all data and activity going back to your initial contract start date with Skillsoft. Because the data in these reports is stored in our data warehouse, you cannot get up-to-the-minute information. Use these reports for trending and year-over-year analysis. These flexible reports allow you to create and save a customized view for later, as well as download and share it.
- **Scheduled reports** - Lists scheduled reports and their information.
- **Report downloads** - Lists all completed or shared reports.

Selecting a Template

The following procedure describes running the Detailed Activity report.

The Detailed Activity report provides metrics on learner engagement with content and digital badges earned. You can filter data by date range, audience, individual user, or asset type. This report shows all learner activity for your organization. Percipio may take up to 24 hours to include relevant activity in this report. You can see at the top of the report when the data was last updated.

Note: This report is best used to show detailed historical data of all time for all users and usage trends over time. Use the Learner activity report for up-to-the-minute details of completions.

The Detailed Activity report shows you:

- Each learner that accessed a piece of content within the specified time frame. Filter the report on a specific piece of content to get this information.
- For every piece of content a learner accessed during the specified time, you see a new record (row) for that learner.
- If a learner restarted a course, you may see two records for that user with the same course name. Both may have a status of Completed, but other data such as duration, test scores, and dates may be different.
- If a learner does not restart a course, but launches or opens the same course multiple times, all duration and test attempts are included in one row for that one course.
- If a learner accessed a journey, you won't see data in the following columns regarding the journey: Estimated duration, Learning hours, First access date and time, Last access date and time, All time first access date and time, All time last access date and time and Total accesses. This is because that information is captured for the content items contained within the journey.

Running a Detailed Activity Report

1. Log into Percipio.
2. Click the **Analytics** tab.
3. Click the **All reports** tab.
4. Click **Detailed Activity** from the list of Activity reports. The template page appears displaying the Detailed Activity report parameters.
    a. In the top right corner of the page, the time the data was last refreshed is listed.
    b. Each user number-related column is specific to the filtered date range. For example, the FIRST ACCESS date is the first time the user accessed the content within the specified date range, and not necessarily the first time the content was accessed.

Updating the Report Parameters

Select the parameters for the report. You can sort the parameters by:

- **Date filters:** The Date filters apply to the DURATION, FIRST ACCESS, LAST ACCESS, and TOTAL ACCESSES columns.
    - **Date Range Presets:** A dropdown list of date ranges that filters the data to the selected range. Select Custom to enter specific dates.
    - **Start:** Instead of using a Date Range preset, use this to specify a start date. When you enter a Start date, the Date Range Presets filter changes to Custom.
    - **End:** Instead of using a Date Range preset, use this to specify an end date. When you enter an End date, the Date Range Presets filter changes to Custom.

- **Audience:** Predefined group of users. Enter the name of an audience and then select it from the list. You can display the data for multiple audiences at the same time by entering more than one audience name.
- **User:** Individual with a Percipio user account. Enter a user's name to filter the report to include that user. You can display data for up to 10 users at the same time by typing in more than one user name.
- **Collections:** Select the name of a content collection to see learning activity associated with just that collection. A collection is a licensed unit of content.
- **Content grouping:** Based on the library hierarchy, select an area or drill down and select a particular subject or channel to see learning activity associated with just that grouping.
- **Asset Type:** Default asset type selections include Audiobook, Audio Summary, Book, Book Summary, Course, Scheduled content (for example, live course), Assessment (for Skill Benchmarks), and Linked Content. To include additional content types, such as videos and journeys, click the Asset Type filter field for a dropdown list. To remove a filter, click the X to the right of the content type.
- **Content title:** Enter the name of a title for a specific content item to see information associated with just that item.
- **Language:** Select only one option from the dropdown list. All Languages is set by default.
- **Include inactive users:** Select this box if you want to show inactive users in your report, otherwise the report only shows active users.

Note: If a user is listed more than once, check that the Usernames (CIDs) match. If they match, this user has multiple assignments in Percipio. Select one row. (Usually, the record with a five-digit Org Code for their department, if an employee.) If the Usernames (CIDs) do not match, select both rows for the user and alert system.training@cu.edu of the duplicate accounts. ELD will investigate the duplicate accounts and consolidate them.

Running the Report

Once you select the parameters for the report, you can run it.

1. Click **Run report**. Percipio displays results based on the parameters you selected.
2. Use the scroll bars to view all the data.

You can organize the columns in the table by sorting, filtering, changing the order, and choosing which ones to display (by selecting the Columns tab on the left of the results page). You can also pin columns and group them (by dragging the columns to group in the Row Groups field in the Columns tab).

Saving Template Parameters as a Personal Template

Once you finalize the data organization in the report, you can save your selected parameters as a personal template or create a schedule for the report.

Note: You can create a customized view for a Standard report, but you cannot save it for future use. You can download and share the customized view.

Saving the Template

1. At the top right side of the screen, click **Actions**.

   Note: Clicking the **Reset to default** button will remove all of your filters and data organization.
2. Click **Save as new template**. The save custom template window displays.
3. Add a template name and review the parameters. If you need to edit them, click **Cancel** and update the report as needed.
4. Click **Save**. The saved report displays in the report list of the section where the Percipio template resides.

Using Your Report Template

From the **All Reports** menu:

1. Locate your template in the section where the original Percipio template resides.
2. Click the template's title. The customized report page displays.
3. Click **Run report**.

   Note: You can update your template before you run it. It will not change the parameters of the saved template. Percipio will allow you to reset the parameters to the last save or save the changes by clicking the **Reset to last save** or **Save changes** buttons at the top right side of the page.

Downloading Report Results

You can download the report from the results in two ways:

- Click **Download report** at the top right side of the page.
- You can also download the reports from the **Report downloads** tab. The Report Downloads page shows your CSV files or the progress of a report's CSV preparation. All CSV files are available for

download for 14 days after successful generation. You can click **Refresh to update your report status** to refresh the report list and statuses.

Note: If the report contains more than 1,048,576 rows, the CSV download will limit the download to 1,048,576 rows. Use the filters on the report home page to adjust the amount of data within the report.

From the Reports download tab, you can filter downloads on:

- **Scheduled:** If selected, it shows reports that are on a schedule.
- **Shared by me:** If selected, it only shows reports that you share with others.
- **Shared with me:** If selected, it only shows reports that others shared with you.

The result page contains the following columns:

- **REPORT NAME:** The name of the report for which the CSV is generated.
- **STATUS:** The status of the CSV file.
  - **Preparing:** The CSV file is generating. To cancel it, click **X**.
  - **Completed:** The CSV file is complete and ready to view. Completed files are available for 14 days after generation. Click **More actions** > **Download** to download and view the file.
  - **Failed:** Something went wrong during CSV generation. Click **More actions** > **Retry** to try again with the same filters and date ranges.
- **FILE SIZE:** The size in KB of the CSV file.
- **EXPIRES:** The number of days left for you to download the specified CSV file. All CSV files are available for 14 days from successful generation.
- **SHARED**_By: If the report has been shared by someone, their name will display here.
- **SCHEDULE NAME:** The name you chose for the report if it was shared.
- **DATE RANGE:** The dates you selected when you generated the CSV.
- **FILTER SUMMARY:** The specific filter settings you selected when you generated the CSV.

Downloading a Report

1. In the Report downloads page, locate the report you want to download.
2. Click the **More actions** icon.
3. Click **Download**.
4. The report will automatically download to your computer as a .csv file.
   a. To access the report at a later date (reports are available for multiple downloads up to their expiration date), go to **Analytics** > **Report downloads.**

Note: From the **More actions** menu, you can also remove a CSV file from the list by clicking **Remove**.

Scheduling a Report

If you need to regularly run a report, you can schedule it to run automatically and have the system notify you when it's ready. Scheduled reports are stored in the **Report downloads** tab for 14 days. If you want the report available for a longer period of time, you can choose to email the report.

Note: Items with an asterisk (*) indicate required information. These fields cannot be blank.

1. From the **Actions** dropdown menu on the results page, click **Create report schedule**.
   - Scheduled reports run automatically and are based on the latest saved version of the report template.
   - You can create a schedule only for a report you created. You cannot create a schedule for a report shared with you.
2. Enter the schedule information, including:
   - **Schedule name:** The name of the schedule so you can find it in the Scheduled reports list.
   - **Schedule start and end dates:** Specify the date that the schedule should start and end. Both are required.
   - **Frequency:** Select how often the report should run: Daily, Weekly, Monthly, or One time. If you have a report scheduled to be delivered on a daily basis, it only includes the difference between yesterday and today. This means that only data in the past 24 hours is included, not the entire past year, for example.
   - **Report date range:** Select the period of time for the data included in the report. This filter overrides any date range filter you set when creating this report. This option does not show when you select a Frequency of Daily because daily reports only show the difference in the last 24 hours.
   - **Send an email reminder when the report is available:** Select this option if you want to get an email reminder when your report is ready.
   - **Send to external location:** This option is used only for UIS reporting. Do not use it for your reports.
3. Click **Create schedule**. You will receive confirmation that your report is scheduled through a popup. Your new scheduled report will run within the next 24 hours and display between 9:00 a.m. and 1:00 p.m. UTC the next day. On the summary screen, you have the following options, select one:
   - **Done:** Confirms your schedule and returns you to the report.
   - **Edit report schedule:** Returns you to the Schedule page so you can make modifications to the report schedule.
   - **Share scheduled report:** Takes you to the Share schedule report page so you can specify names or audiences with whom to share the report.

   a. Enter up to 10 users or 10 audiences.

   b. Check whether users should get an email notification when the scheduled report is ready.

c. Change the sender name as needed (the sender's name field will auto-populate with your name). This shows in the From line in the recipient's email.

d. Enter up to a 250-character message letting the recipients know what is in the report and why they are getting it.

- **Select Share scheduled report:** The scheduled report will be shared. Click Cancel to return to the report without sharing it.

Sharing a Report

After you run a report, you can share it with other Percipio users. If a shared user only has the role of learner, they can only download the report itself, they do not see any other admin feature or function.

Note: When you share a report with a user, that user sees the full report even if they are only assigned to a specific audience.

Because downloaded reports are only available for 14 days, you can only share a report during that 14-day duration. On the fifteenth day, the report is removed from the download list, and shared users lose access to it.

Note: Sharing a report will not create a schedule for the report.

Sharing a Report with Other Percipio Users

1. From **Analytics**, click **Report downloads**.
2. Locate the report you want to share in the list. From the **Actions** column, click **Manage single report sharing**.
3. Enter the users or audiences, then click **Share report**.

If you previously shared the report, you see those users and audiences listed. You can add more users and audiences to the current list, or you can remove the existing users and audiences and add new ones.

4. Enter an optional message.
5. If the checkbox for Send an email only to added users is selected, only the users and audiences you just added receive the email. If the checkbox is not selected, all users and audiences listed receive the email. Alternatively, you can click Copy Link to get a link that you can paste.

Stop Sharing a Report

To stop sharing a report with all users and audiences listed:

1. From Analytics, click **Report downloads**.
2. Locate the report you shared in the list. From the Actions column, click **Manage single report sharing**.
3. Click **Stop sharing**. All users and audiences can no longer access the shared report.

Viewing a Shared Report

Shared reports can be viewed by accessing the Report download tab or by clicking the link found in the email sent from Percipio. If you have a Report Admin role, you see all user data contained in the report, not just user data from the audiences you were assigned.

When you click the **Run report** button from the email,

1. Log into your Percipio account if you are not already signed in.
2. The report landing page automatically opens showing you details about the information in the report, its size, and when it expires.
3. To see all data in the report, you must select **Download report** from the **Actions** menu.

Other Training-Related Completion Reports (CU-Data, HCM)

You can also use the following systems and reports to find course completion data information.

- **CU-Data Employee and Student Completion reports:** The Central Information Warehouse (CIW) is CU's system-wide centralized data repository for information sourced from administrative systems, including Human Capital Management (HCM), Finance (FIN), and CU Student Integrated Systems (CU-SIS). The CU Reporting System, CU-Data (also known as Cognos), is a tool offering standardized reports using data from the CIW. Percipio sends training completion information to the CIW through an overnight process. You can run completion reports from the employee portal. HCM access is not required to run this training report. Refer to *Running a Training Completion Report using CU-Data Step-by-Step Guide* for more information.
- **HCM Comprehensive Learning Report:** HCM is the system of record for employee training completions. This report provides training completions (and non-completions) data for all university employees, faculty, university affiliates and persons of interest (POIs). Your HR representative or HCM department user can run this report. You must have HCM security access to Admin Training to run this report. Refer to *HCM Running the Comprehensive Learning Report Step-by-Step Guide* for more information about running this report.