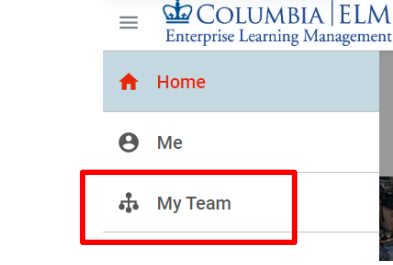

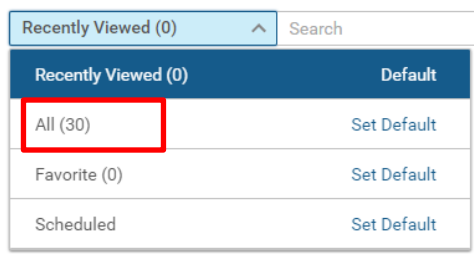
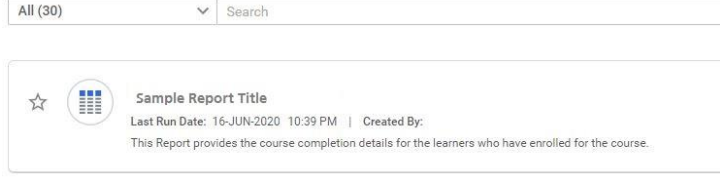
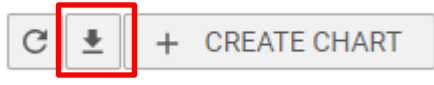


## How to Run Reports as an Organization Manager

The **My Team** page provides quick access to common tasks that summarize information about your team. It is accessible to people assigned as a manager in ELM (those who have direct reports) **and** is available to individuals designated as an organization manager for his or her school/department.

Analytics are available via the **My Team** page. There are certain reports that have been provided to you as an organization manager that you can run for your school/department.

<p>1. Log in to <a href="#">ELM</a>; navigate to <b>the menu on the top left</b> and click on My Team.</p>	
<p>2. Using the navigation in the upper left corner of the “My Team” tab, select the analytics icon.</p>	
<p>3. Once on the Analytics tab, click the arrow next to “Recently Viewed” on the search bar, and select “All.”</p> <p><i>Note: You can click “Set Default” to keep this as your default view when you navigate to the page.</i></p>	
<p>4. Search for the report you want to run.</p> <p>a. To run the report, simply click anywhere in the box for that report (it will highlight in blue).</p>	
<p>5. Once the report has run, click the down arrow in the upper-right corner to download it to PDF, Excel or CSV.</p>	

6. Some reports give you the ability to create a custom chart. Click the “Create Chart” and then select the chart type you wish to use and complete the required fields

7. You may also choose to schedule the report to run and be sent, via email, to yourself or others

- a. From the main report listing page, click the “Schedule” button to the right of the report name
- b. Then Click “ “Add New Schedule” on the pop-up window
- c. Complete the parameters for your scheduled report and then click “Save.”

*Report parameters include:*

### Schedule tab

- *frequency* – how often you want the report to run automatically
- *report format* – PDF, Excel, or CSV
- *Recipient* – enter one or more email addresses to whom you want to send the report
- *Subject and Body* – you can customize the email that will be sent along with the completed report

### Filters tab

- *If the report has filters that can be changed, for example the title of the course you are running a report on, you can change that on the Filters tab. Filters will vary by report.*

Create Chart

Bar

Pie

Donut

Line

Scatter

Radar

Group Radar

Stacked Bar

Area

Group Bar

Ranking

All (1)

Search

☆

Web-Based Training Status Report\_0

Last Run Date: 30-JUN-2020 8:43 PM | Created By: Virginia Kaplan

Allows user to enter the name of a web-based training course and view registrations and co

SCHEDULE

X

🔍

⚙️

ADD NEW SCHEDULE

COPY OF NEW HIRE HIPAA TRAINING STATUS REPORT

Schedule Filters

Frequency\*

Select frequency ▾

Report Format\*

XLSX ▾

Data Only ☐

Recipient Type

☒ Email ☐ Person

Email Address

Subject\*

Your "report\_name" report is ready.

Body\*

B I U S

Text alignment icons

List icons

More

Your requested report has been created and is attached to this email. If you have any problems viewing the report or any questions, please contact us.