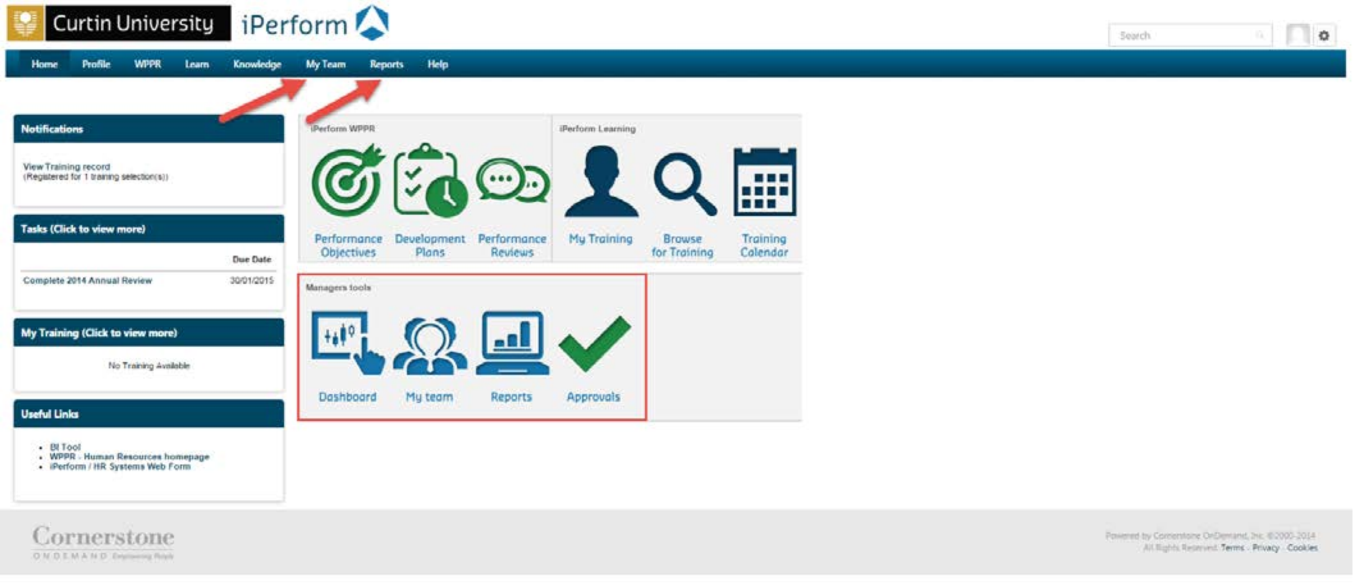
HOW TO ACCESS DIRECT REPORTS TRAINING RECORDS

This is a quick reference guide on how view training records in iPerform for subordinates.

There are multiple methods of viewing training records in iPerform. From the Welcome Page you should also see the “Managers Tools” icons.



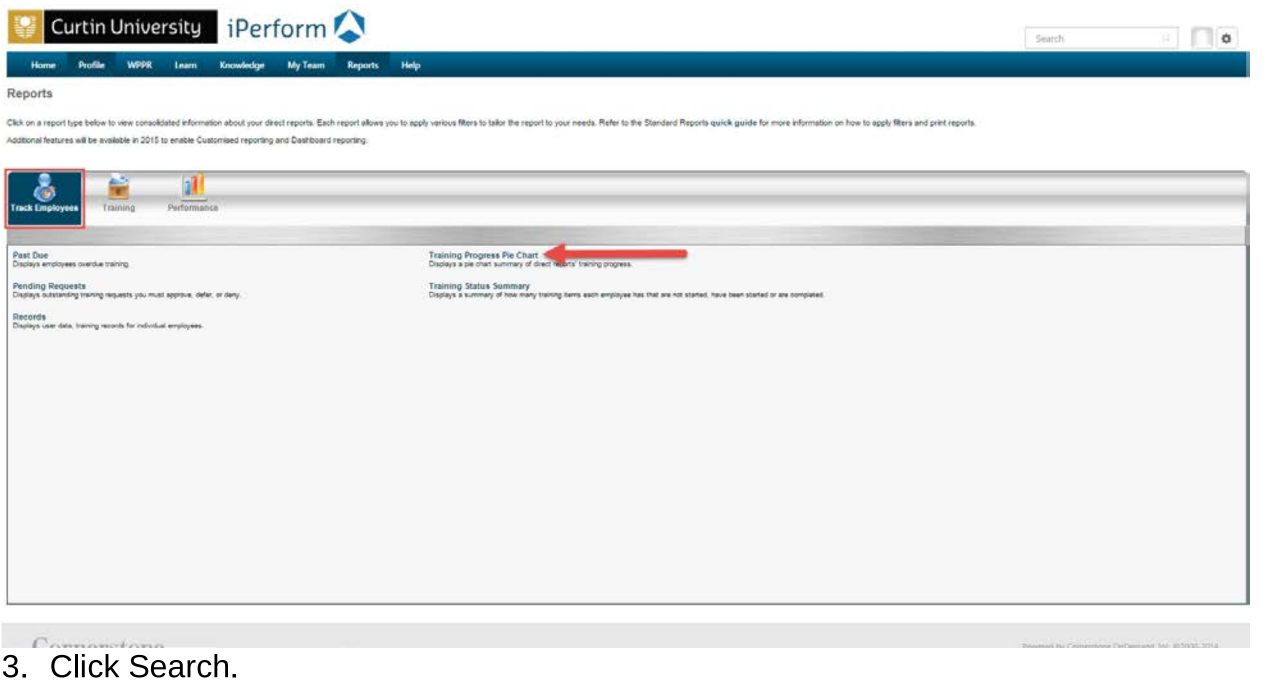
REPORTS

As a manager you can run reports to view training records for your staff.

STANDARD REPORTS

A graphical view is available through the Training Progress Pie Chart report. This is through the standard report tools available to managers in iPerform.

1. From the Reports menu select Standard Reports.
2. Under “Track Employees” reports, select the link to the Training Progress Pie Chart report.

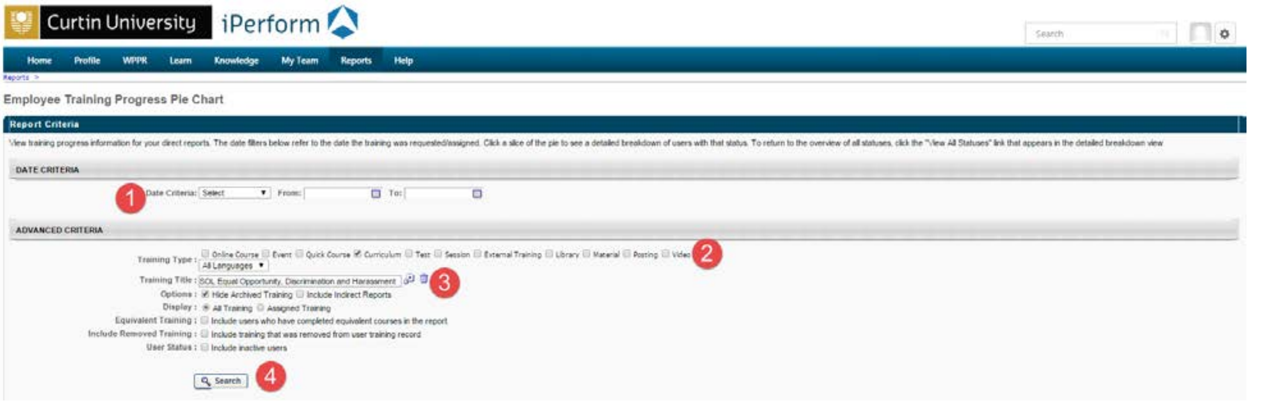


3. Click Search.

The results will appear at the bottom of the page and will include a pie chart view of the report. This will include all courses.

4. Click on the section of the pie chart to filter data, for example click on the red overdue pie wedge to view your direct reports with overdue training.
5. Export to excel by clicking the Export to Excel link.

You can choose to narrow the search criteria:



1. Enter date range. To replicate the custom reporting you may wish to enter a from date of 1/1/2011.
2. Check a training type of curriculum (only).
3. Click the icon to search for specific training titles. Ensure to click the Curriculum for the following compliance courses:
   i. SOL Code of Conduct (CC001)
   ii. SOL Information Management (IMB01)
   iii. SOL Equal Opportunity, Discrimination and Harassment (EO001)
   iv. SOL Health & Safety Induction (OSH01)
   v. SOL Competition and Consumer Act - Modules 1-5 (CCA02)
   vi. SOL Competition and Consumer Act - Module 6 (CCA03)
4. Click search.

CUSTOM REPORTS

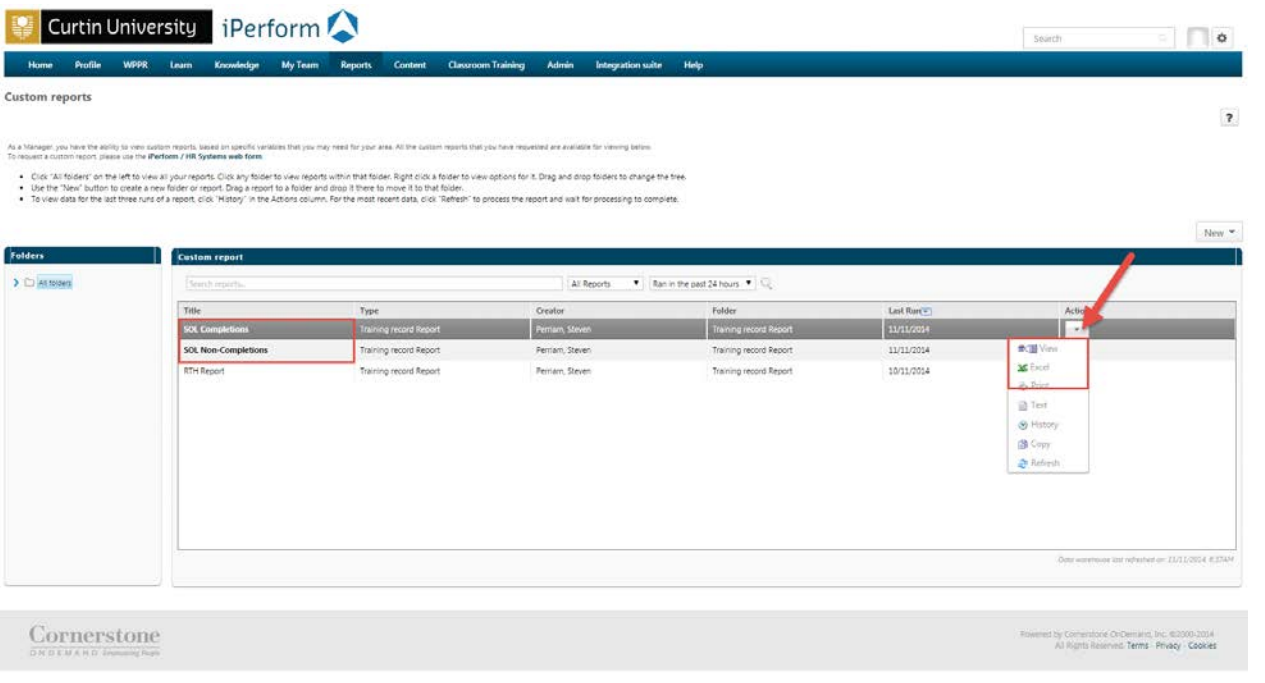
The only way to view all courses in the one report is via custom reporting.
These records include historical records from Alesco, Completion Date is on or after 1/1/2011.

The report includes the following courses:

SOL Code of Conduct (CC001)
SOL Information Management (IMB01)
SOL Equal Opportunity, Discrimination and Harassment (EO001)
SOL Health & Safety Induction (OSH01)
SOL Competition and Consumer Act - Modules 1-5 (CCA02)
SOL Competition and Consumer Act - Module 6 (CCA03)

1. From the Reports menu select Custom Reports.

An example of the custom reports screen is shown below:



2. Locate the following custom reports:
    a. SOL Completions
    b. SOL Overdue
    c. SOL Non-Completions
3. From the actions tab for each report, click the drop down arrow and select 'Excel'. If this is the first time running this report you may need first click 'Refresh' before exporting to Excel.
4. Download the file and open.
5. Depending on the number of direct reports you may need to sort and filter.

iPerform uses a number of status for training. These can include:

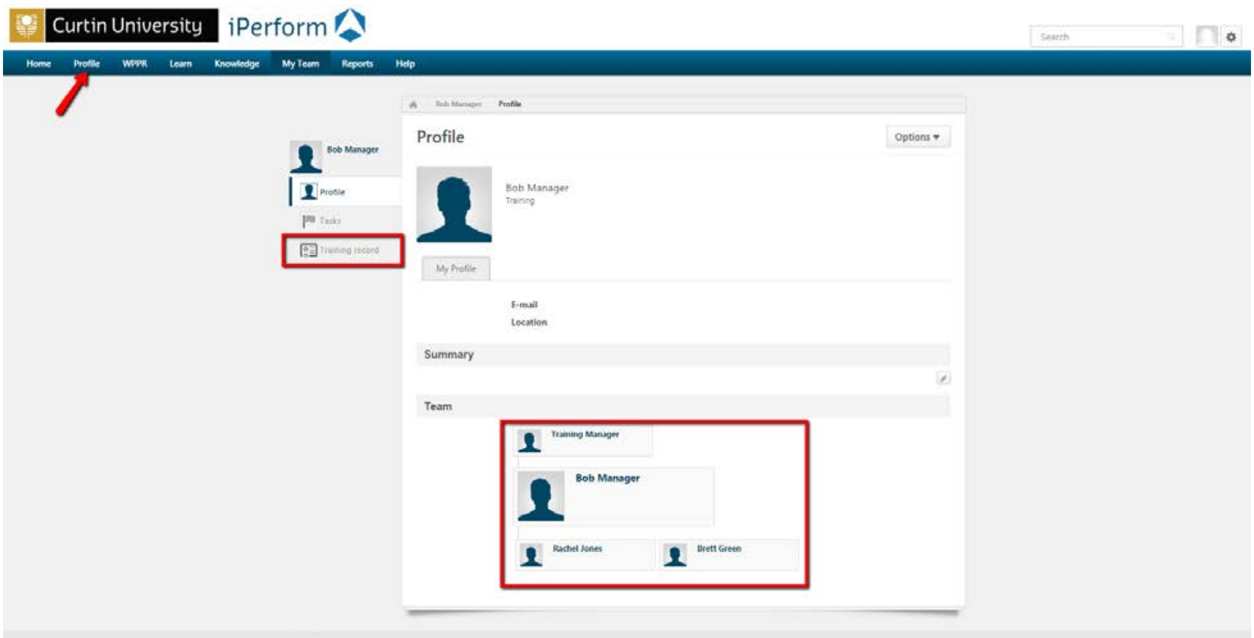
i) Started
ii) Registered
iii) Started/Overdue
iv) Completed (or Pass)

PROFILE

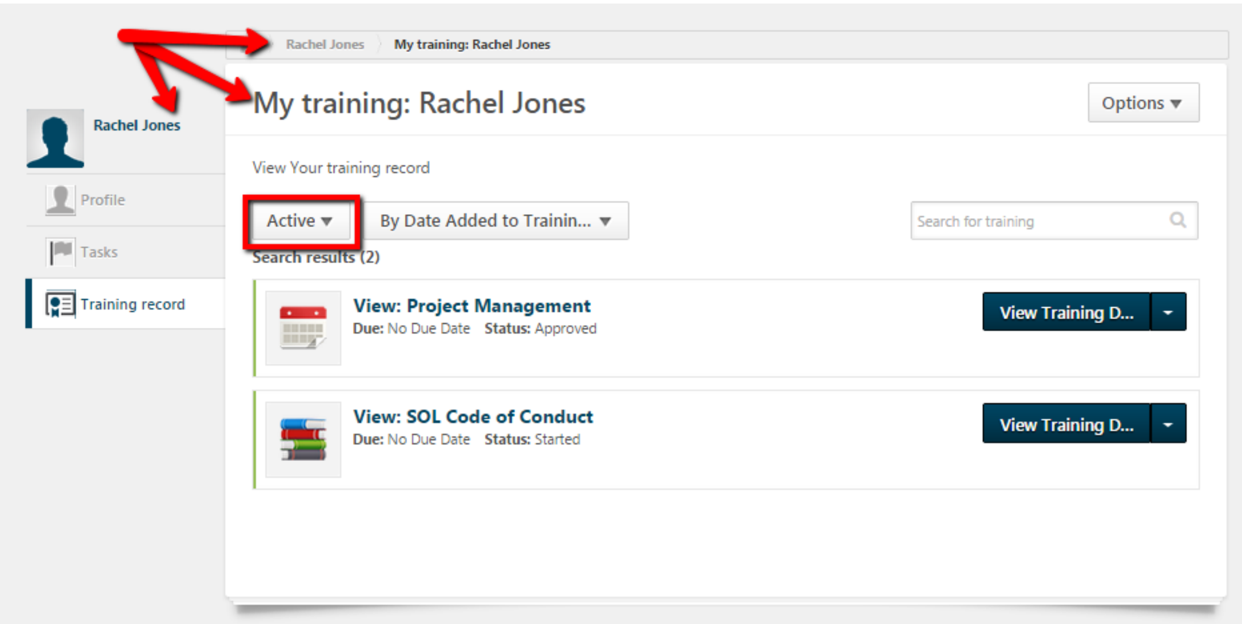
There are options available under the Profile menu.

You can view the current Organisational Chart for your direct reports and see your line manager.

1. Click a staff members name from the Organisational Chart to view.



2. You are then taken to their Profile screen. Click "Training record" from the side bar to view their training records.

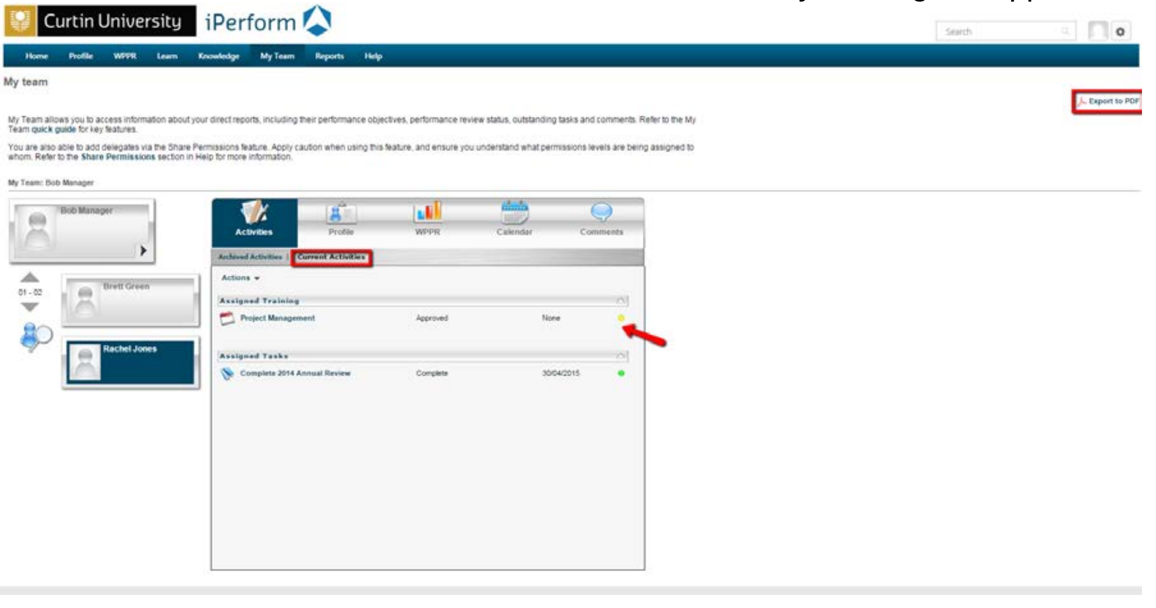


3. Ensure you are viewing the correct staff members training records. The staff members name will appear in multiple places.
4. Toggle between Active and Completed training from the Active drop down menu.

MY TEAM

As a manager you should have access to the My Team menu.

1. Once on the My Team page, select a staff member from the list.
2. From the Activities tab, click Current Activities. Any training will appear in this list.



3. iPerform uses a traffic light system to indicate the status of an activity.
    a. Red – an activity is overdue.
    b. Amber – an activity is almost due.
    c. Green – a current activity.
4. You can also export the training record from My Team by clicking the Export to PDF link.

The My Team approach will be phased out in 2015.