

Learning Nexus Ltd.



Learning Management System Release 2.13

Group Manager's Guide

DISCLAIMER

THIS DOCUMENTATION IS PROVIDED FOR REFERENCE PURPOSES ONLY. WHILE EFFORTS WERE MADE TO VERIFY THE COMPLETENESS AND ACCURACY OF THE INFORMATION CONTAINED IN THIS DOCUMENTATION, THIS DOCUMENTATION IS PROVIDED "AS IS" WITHOUT ANY WARRANTY WHATSOEVER AND TO THE MAXIMUM EXTENT PERMITTED, IVY DISCLAIM ALL IMPLIED WARRANTIES, INCLUDING WITHOUT LIMITATION THE IMPLIED WARRANTIES OF MERCHANTABILITY, NONINFRINGEMENT AND FITNESS FOR A PARTICULAR PURPOSE, WITH RESPECT TO THE SAME. IVY SHALL NOT BE RESPONSIBLE FOR ANY DAMAGES, INCLUDING WITHOUT LIMITATION, DIRECT, INDIRECT, CONSEQUENTIAL OR INCIDENTAL DAMAGES, ARISING OUT OF THE USE OF, OR OTHERWISE RELATED TO, THIS DOCUMENTATION OR ANY OTHER DOCUMENTATION. NOTWITHSTANDING ANYTHING TO THE CONTRARY, NOTHING CONTAINED IN THIS DOCUMENTATION OR ANY OTHER DOCUMENTATION IS INTENDED TO, NOR SHALL HAVE THE EFFECT OF, CREATING ANY WARRANTIES OR REPRESENTATIONS FROM IVY (OR THEIR SUPPLIERS OR LICENSORS), OR ALTERING THE TERMS AND CONDITIONS OF THE APPLICABLE LICENSE AGREEMENT GOVERNING THE USE OF THIS SOFTWARE.

Copyright

Under the copyright laws, neither the documentation nor the software may be copied, photocopied, reproduced, translated, or reduced to any electronic medium or machine-readable form, in whole or in part, without the prior written consent of Learning Nexus Ltd., except in the manner described in the documentation or the applicable licensing agreement governing the use of the software.

© Copyright Learning Nexus Ltd.
235 Roehampton Lane
London, SW15 4LB

All Rights Reserved.

List of Trademarks

Intel and Pentium are registered trademarks of Intel Corporation.
Microsoft, Windows, Access, ActiveX, Internet Explorer and SQL Server are registered trademarks of Microsoft Corporation in the United States, other countries, or both.
Other company, product, and service names may be trademarks or service marks of others.

This page intentionally left blank

Contents

1. About the Learning Management System	1
LMS Components	1
LMS Core Module	1
Relational Database Management System	1
LMS User Import Utility	2
LMS Content Integration Utility	2
LMS Data Flow	2
2. LMS Requirements	3
Database Requirements	3
LMS Server Requirements	3
Server Hardware Requirements	3
Server Software Requirements	4
LMS Client Requirements	4
Client Hardware Requirements	4
Client Software Requirements	4
3. LMS User Interface	6
Menu Navigation Bar	6
Main Content Area	6
Page Navigation Bar	7
4. LMS Administration Tasks	8
Who's who in the LMS?	8
What does a System Administrator do?	9
What does a Site Administrator do?	9
What does a Group Manager do?	10
5. Group Manager Tasks	11
Generating Group Usage Reports	11
Generating Group Risk Reports	12

6. Generating Administration Reports	13
Learning Activity Report	17
Access Summary Report	17
Detailed Report	18
Course Information	19
Lesson Information	19
Objective Information	20
Usage Type Summary Report	52
Zero Usage Summary Report	54
Learning Tool Reports	55
Learning Methods	56
Individual Report	58
Multi-User Target Report	59
Multi-User Budget Report	60
Training Needs Analysis	61
Individual Report	63
Multi-User Level Summary	64
Multi-User Level Report	65
Multi-User Topic Report	66
Zero Usage Report	67
Certificate Report	68
7. Generating Risk Assessment Reports	71
Risk Report by Topic	74
Risk Report by User	76
Risk Detail Summary	78
Risk Assessment Notes Report	79

Figures

Figure 3-1: LMS User Interface Layout	6
Figure 4-1: LMS Organisational Hierarchy	8
Figure 5-1: Main Menu for a Group Manager	11
Figure 5-2: Group Selection Menu for Group Reports	12
Figure 6-1: Administration Report Menu	13
Figure 6-2: Administration Report Options Menu	15
Figure 6-3: Sample Access Summary Report	17
Figure 6-4: Sample Detailed Learning Activity Report	18
Figure 6-5: Sample Usage Type Summary Report	52
Figure 6-6: Sample Zero Usage Summary Report	54
Figure 6-7: Administration Learning Tool Reports Menu	55
Figure 6-8: Learning Methods Report Menu	56
Figure 6-9: Sample Learning Methods Individual Report	58
Figure 6-10: Sample Learning Methods Target Report	59
Figure 6-11: Sample Learning Methods Budget Report	60
Figure 6-12: Training Needs Analysis Report Menu	61
Figure 6-13: Sample Training Needs Analysis Individual Report	63
Figure 6-14: Sample Training Needs Analysis Multi-User Level Summary Report	64
Figure 6-15: Sample Training Needs Analysis Multi-User Level Report	65
Figure 6-16: Sample Training Needs Analysis Multi-User Topic Report	66
Figure 6-17: Sample Training Needs Analysis Zero Usage Report	67
Figure 6-18: Achievement Certificates by User Example	68
Figure 6-19: Certificate of Achievement Example	70
Figure 7-1: Risk Reports Menu	71
Figure 7-2: Risk Report Options Menu	73
Figure 7-3: Sample Risk Report by Topic	74
Figure 7-4: Sample Risk Report by User	76
Figure 7-5: Sample Risk Detail Summary Report	78
Figure 7-6: Sample Risk Assessment Notes Report	79
Figure 7-7: Add / Modify note dialog	80

This page intentionally left blank

1. About the Learning Management System

The Learning Management System (LMS) is a highly effective, standards-based product capable of managing learners in an effective, hierarchical manner and organising, delivering and tracking both online web-based courses and offline content such as books and videos.

The LMS has been designed to be as simple to use as possible for both learners and administrators and is fully web-based and therefore can be deployed across a corporate Intranet, the Internet or in the case of small learning centres it can be accessed throughout the learning centre using a personal web server installed on one of the centre's machines.

LMS Components

The LMS consists of the following components: -

- LMS Core Module
The core module provides a user interface for managing users and delivering courses, as well as the underlying technology needed to connect to the LMS database, web clients and course materials.
- Relational Database Management System
This maintains one or more relational databases dedicated to the LMS. It may additionally contain other databases that are not used by the LMS.
- LMS User Import Utility
This utility provides a mechanism for easily adding large numbers of users to the LMS database.
- LMS Content Integration Utility
This utility provides a mechanism for importing third-party content into the LMS.

LMS Core Module

This is the main component of the Learning Management System. The core module stores all of the information about the sites, groups and users that have been defined within the system as well as the details of the courses that can be accessed and all of the data on the usage of these courses by the users of the system.

The core module also provides an easy to use, web-based interface for managing this information, accessing the courses and producing reports on the usage of the courses.

Relational Database Management System

The Learning Management System stores its data in a relational database, which consists of a series of tables. For a small installation, the database management software is the Microsoft Jet Database Engine and this is used to connect to a Microsoft Access database on the same machine as the LMS. For a larger scale installation, it is recommended that Microsoft SQL Server be used as the database management software. This can reside on the same machine as the LMS but generally it will reside on a separate machine for performance reasons.

An LMS-specific database is created with the database management system and then customised during the LMS installation. The LMS core module interacts with this database

using database transactions to retrieve and update information about users, courses, course usage data etc.

LMS User Import Utility

This utility provides a mechanism for automatically importing large numbers of users into the Learning Management System without the need to type their details into the LMS interface one by one. The utility makes use of a pre-formatted text file containing the details of the users to be added to the LMS which can be generated very easily from an existing database of users.

LMS Content Integration Utility

This utility provides a mechanism for importing content that has been provided by a third-party vendor into the Learning Management System.

Ideally, these courses will have been designed using the AICC (Aviation Industry CBT Committee) guidelines for interoperability or will meet the conformance requirements of version 1.2 of the SCORM (Shareable Content Object Reference Model), which define standard mechanisms for communication between courseware and learning management systems. These courses can be fully integrated into the LMS. For more information on the AICC guidelines, please visit <http://www.aicc.org>. For more information on the SCORM conformance requirements, please visit <http://www.adlnet.org>.

However, many web-based courses that have not been designed using the AICC or SCORM standards can also be imported, launched and tracked by the LMS although the usage information that is recorded by the LMS for these courses will be less detailed.

It is also possible to define non web-based or 'offline' courses with this utility and import these into the LMS. Whilst users will not be able to utilise these courses directly through the LMS interface, this will enable administrators and managers to manually create usage records for these courses which can then be included in the reports of the learning activities of users.

LMS Data Flow

The LMS uses several technologies to send and receive data among components within the system. The LMS core module is the entry point for all users. When a user logs on to the LMS, the core module provides the client browser with an interface. This interface provides access to the administration functions and the course materials. The core module also provides a mechanism for accessing and modifying data stored in the relational database and the course content servers. Microsoft Internet Information Server (IIS) and the Microsoft Data Access Components (MDAC) manage these connections.

Communication between the relational database and the LMS is based on an OLE DB interface provided by Microsoft ActiveX Data Objects (ADO). Information such as user names, course structure and student progress is stored as records in tables within the relational database. The LMS core module uses Structured Query Language (SQL) commands to send and receive data from the database.

To access course content, the LMS retrieves the URL associated with a particular course's activity, points the student's web browser to the corresponding URL, and displays the file's contents in the LMS user interface. Usage information, such as student scores and completion status, passes from the course content to the LMS through HTTP commands.

2. LMS Requirements

The Learning Management System is supported on a specific set of hardware and software components. If you are installing the LMS for the first time on a server or upgrading from an earlier release, you may need to upgrade hardware and/or software before the LMS can function effectively on that machine. Using the LMS with unsupported hardware and/or software may result in data loss, as well as problems accessing the system.

Before installing the LMS, please ensure that you have installed the required hardware and software described in this chapter.

Database Requirements

The Learning Management System requires a relational database management system as a database is created (or upgraded) during the installation process specifically for use with the LMS. The LMS supports the following relational database management systems: -

- Microsoft Jet Database Engine v4 (MDAC) (latest Service Pack recommended)
- Microsoft SQL Server 2000 (latest Service Pack recommended)
- Microsoft SQL Server 2005 (latest Service Pack recommended)
- Microsoft SQL Server 2008 (latest Service Pack recommended)

The Microsoft Jet Database Engine v4 is utilised in a small-scale installation to connect to a Microsoft Access 2000 database and is included as part of the Microsoft Data Access Components (MDAC) version 2.0 to 2.5. There are no specific hardware requirements.

Microsoft SQL Server is recommended for larger-scale installations. For further information on the system requirements of Microsoft SQL Server, please see the supplied documentation or visit <http://www.microsoft.com/sql>. Mixed mode authentication is required for the connection to the SQL Server database.

You should allow 1 MB of database table space for each LMS user.

LMS Server Requirements

It is recommended that the server on which the LMS is to be installed meets the following minimum hardware and software requirements: -

Server Hardware Requirements

- Pentium-based (Pentium® III or later) server
- 800 MHz or faster
- 512 MB of RAM
- 500 MB of disk space

These are the minimum recommended requirements for the LMS but it is probable that your installation will require more than this. The server's processor and memory requirements are directly affected by the number of courses and users registered in the LMS, and particularly by the number of students using the LMS at any one time and this will have a corresponding effect on the speed of the server.

Server Software Requirements

The LMS requires that either of the following operating systems and system software be installed before the LMS is installed: -

- Microsoft Windows 2000 Server (latest Service Pack recommended)
- Microsoft Internet Information Server v5

Or

- Microsoft Windows Server 2003 (latest Service Pack recommended)
- Microsoft Internet Information Server v6

Or

- Microsoft Windows Server 2008 (latest Service Pack recommended)
- Microsoft Internet Information Server v7

Alternatively, if a very small scale installation is required (between 1 and 5 client computers), the following operating systems and system software are required before the LMS is installed: -

- Microsoft Windows 2000 Professional (latest Service Pack recommended)
- Microsoft Internet Information Server v5

Or

- Microsoft Windows XP Professional (latest Service Pack recommended)
- Microsoft Internet Information Server v5.1

Or

- Microsoft Windows Vista Business, Enterprise or Ultimate Edition (latest Service Pack recommended)
- Microsoft Internet Information Server v7

In either case, the following software components are also required and will be updated during the LMS installation if necessary: -

- Microsoft Data Access Components (MDAC) v2.5
- Microsoft Windows Script Engine v5.6

LMS Client Requirements

It is recommended that the client machines that are used to access the LMS meet the following minimum hardware and software requirements: -

Client Hardware Requirements

- Pentium®-based (Pentium® II or later) computer
- 500 MHz or faster
- 256 MB of RAM
- 50 MB disk space
- 56 Kb/s connection

Client Software Requirements

The following operating systems are supported for use on client machines: -

- Microsoft Windows 2000 Professional
- Microsoft Windows XP
- Microsoft Windows Vista
- Microsoft Windows 7

The following web browsers are supported for use on client machines: -

- Microsoft Internet Explorer 6 or later
- Microsoft Internet Explorer 8 is recommended

The following Internet Explorer settings must be enabled: -

- Run ActiveX controls and plug-ins
- Script ActiveX controls marked safe for scripting
- Submit non-encrypted form data
- Active scripting
- Accept session cookies

It is recommended that the following Internet Explorer security settings be enabled: -

- Access data sources across domains (if the LMS resides on a different domain to any courseware content)
- File download (if report saving is required)

It is also recommended that the browsers be set to show the newest version of a page, rather than showing cached pages.

3. LMS User Interface

The user interface for the Learning Management System consists of three separate content areas: a menu navigation bar; a main content area and a page navigation bar. Figure 3-1 illustrates the layout of these content areas: -

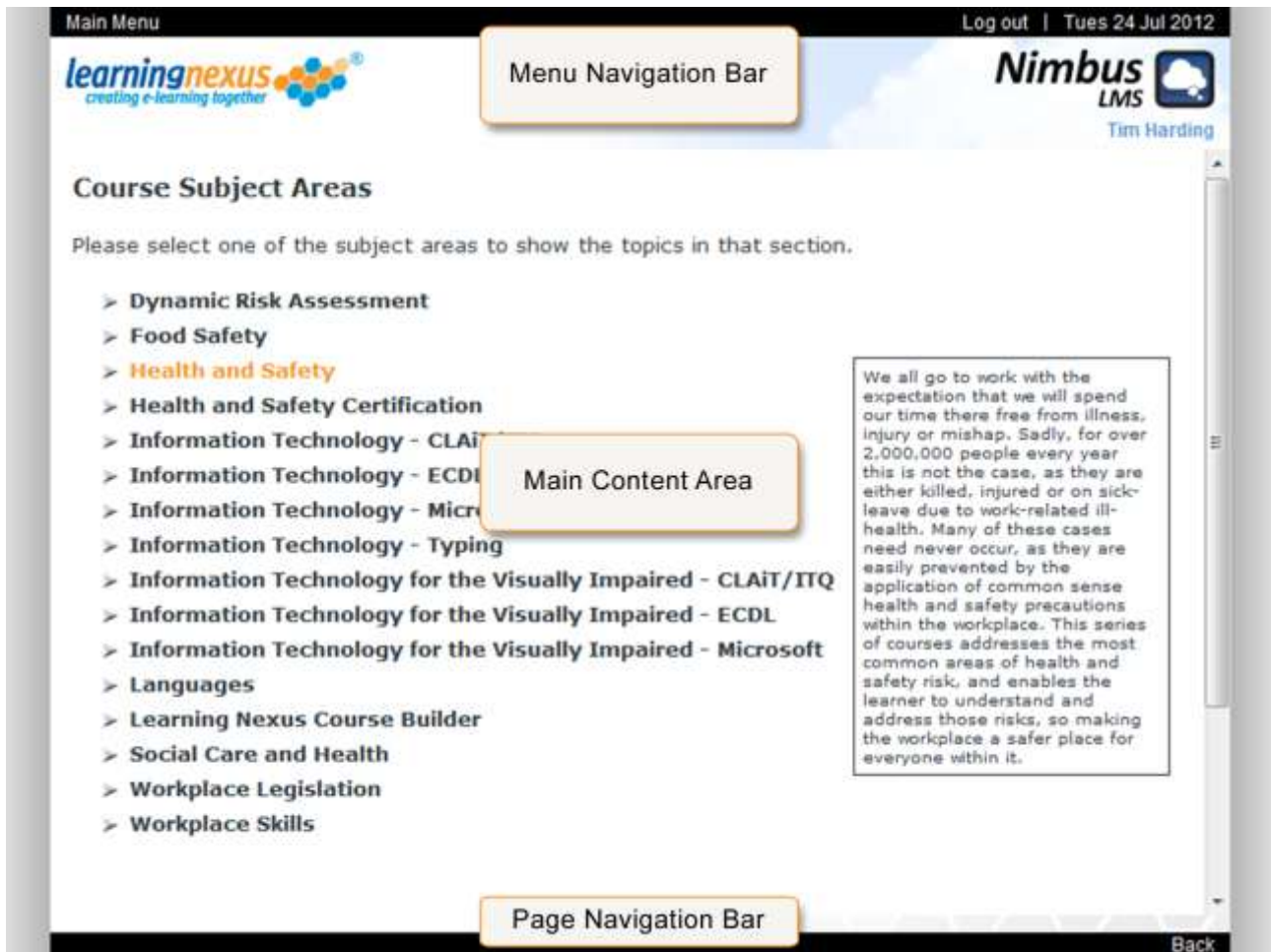


Figure 3-1: LMS User Interface Layout

Menu Navigation Bar

The menu navigation bar is used to display three content items: -

- Menu shortcuts
- Today's date
- The familiar name of the current LMS user

Main Content Area

The main content area is used to display the interface used to perform the functions available within the current section of the LMS. These pages usually consist of a brief explanation of the functions available in the section, instructions on the use of these functions and the menu or tools used to perform them.

Page Navigation Bar

The page navigation bar is used to display shortcuts to the previous or next page in the current section of the LMS when these functions are available.

4. LMS Administration Tasks

There are many administrative tasks that must be carried out within the LMS, such as adding users and generating reports on course usage. In order to help you manage these tasks effectively, the LMS supports four types of user; each with a different level of responsibility and control over the LMS functions and each corresponding to a different level in the organisational hierarchy that can be defined within the LMS.

The LMS uses the concept of sites and groups to effectively organise the courses and users which it manages. Figure 4-1 illustrates this organisational hierarchy: -

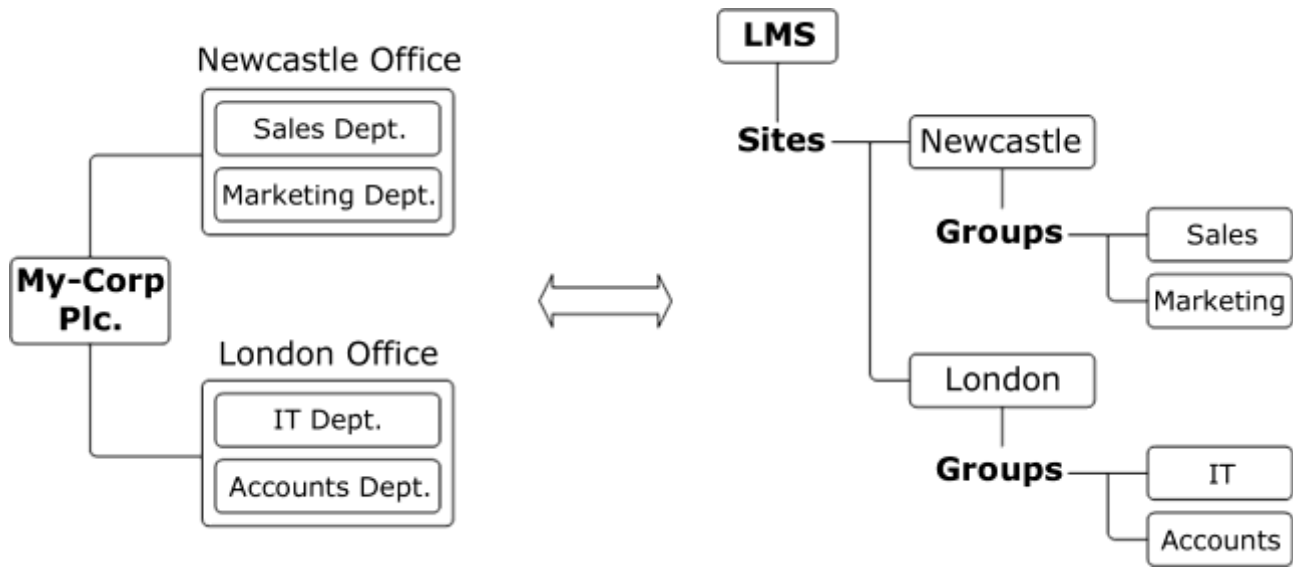


Figure 4-1: LMS Organisational Hierarchy

This example relates the different sites within the LMS to the different geographical locations of the offices within 'My-Corp Plc' and the groups within the sites to the departments within these offices. However, this hierarchy can be defined in many different ways, with a site or group corresponding to any logical grouping of users and courses. For example, it may be more appropriate for you to organise users by job role rather than physical location etc.

Who's who in the LMS?

The four types of user supported by the LMS, in decreasing order of responsibility, are as follows: -

- System Administrators

These users have complete control over all of the settings and functions of the LMS. System administrators exist above the site hierarchy and as such, are unable to study courses.

- Site Administrators

These users are members of a particular site within the LMS and have complete control over all of the settings and functions of the site to which they belong. Site administrators may also study courses.

- Group Managers

These users are members of one or more groups within a site and may generate reports of learning activity for the other members of the group(s) to which they belong. Group managers may also study courses.

- Users

Standard users are either members of a site or are members of one or more groups within a site and may study courses and produce reports of their own learning activities.

What does a System Administrator do?

An LMS system administrator is responsible for the overall configuration of the system and this role is often assigned to the person that is responsible for the installation of the LMS and the management of the server(s) on which it resides.

A system administration account is automatically created during the LMS installation / upgrade process using the details that are entered by the person performing the installation. There can be multiple system administration user accounts defined within the LMS.

The main responsibilities of a system administrator are as follows: -

- Managing the global settings of the LMS
- Creating and managing the sites defined within the LMS
- Managing the courses that are delivered by the LMS
- Managing the system administration user accounts

An LMS system administrator may also perform all of the administration tasks that can be performed by a site administrator.

What does a Site Administrator do?

An LMS site administrator is responsible for the configuration of the site within the LMS of which they are a member. This role is often assigned to the person(s) responsible for managing the learning activities for the location corresponding to their LMS site.

If the LMS has been upgraded from a previous version that did not support sites, the system administration accounts from the previous version will have been converted to site administration accounts for the default site in the new version. There can be multiple site administration user accounts for any particular site within the LMS.

The main responsibilities of a site administrator are as follows: -

- Managing the LMS settings for the site
- Creating and managing the groups defined within the site
- Creating and managing the user accounts defined within the site
- Generating learning activity reports for the site

An LMS site administrator may also perform all of the administration tasks that can be performed by a group manager.

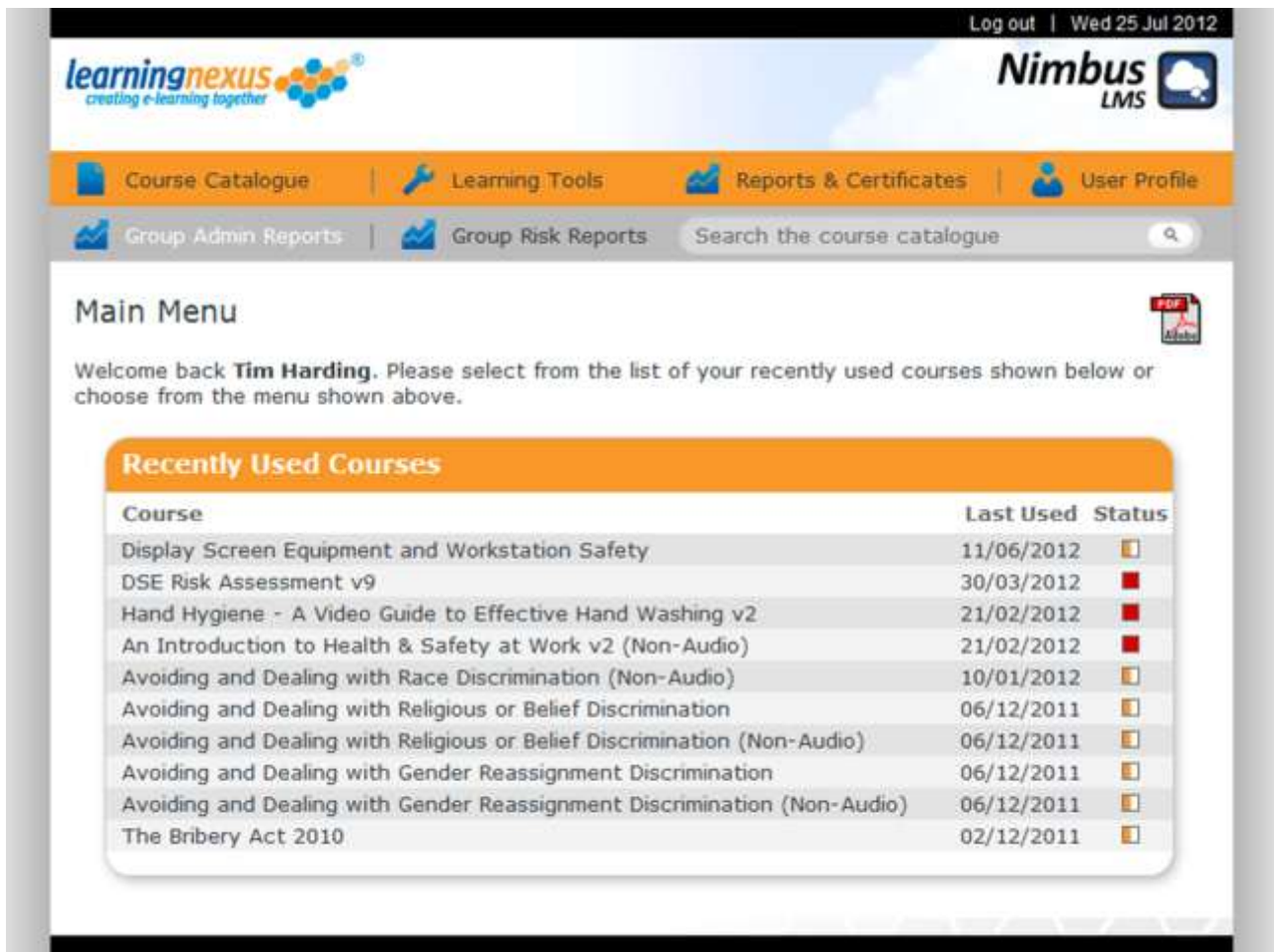
What does a Group Manager do?

An LMS group manager is responsible for generating learning activity reports for the members of the group(s) which they manage. This role is often assigned to a team leader or supervisor. There can be multiple group manager accounts for any particular group within an LMS site.

5. Group Manager Tasks

The main menu of the LMS contains the additional 'Group Admin Reports' menu item when the currently logged-on user is a group manager. If the optional LMS Risk Assessment Module has been installed and made available to the group manager's site then the 'Group Risk Reports' menu item is also displayed.

Figure 5-1 shows the main menu that is displayed for a group manager: -



The screenshot displays the LMS main menu for a group manager. At the top, there is a navigation bar with the LearningNexus logo, Nimbus LMS branding, and several menu items: Course Catalogue, Learning Tools, Reports & Certificates, User Profile, Group Admin Reports, and Group Risk Reports. A search bar is also present. Below the navigation bar, the main content area is titled 'Main Menu' and includes a welcome message for 'Tim Harding' and a 'Recently Used Courses' table.

Course	Last Used	Status
Display Screen Equipment and Workstation Safety	11/06/2012	<input type="checkbox"/>
DSE Risk Assessment v9	30/03/2012	<input checked="" type="checkbox"/>
Hand Hygiene - A Video Guide to Effective Hand Washing v2	21/02/2012	<input checked="" type="checkbox"/>
An Introduction to Health & Safety at Work v2 (Non-Audio)	21/02/2012	<input checked="" type="checkbox"/>
Avoiding and Dealing with Race Discrimination (Non-Audio)	10/01/2012	<input type="checkbox"/>
Avoiding and Dealing with Religious or Belief Discrimination	06/12/2011	<input type="checkbox"/>
Avoiding and Dealing with Religious or Belief Discrimination (Non-Audio)	06/12/2011	<input type="checkbox"/>
Avoiding and Dealing with Gender Reassignment Discrimination	06/12/2011	<input type="checkbox"/>
Avoiding and Dealing with Gender Reassignment Discrimination (Non-Audio)	06/12/2011	<input type="checkbox"/>
The Bribery Act 2010	02/12/2011	<input type="checkbox"/>

Figure 5-1: Main Menu for a Group Manager

Please note that clicking on the 'Adobe PDF' icon will open the Group Manager's Guide in a new window.

Generating Group Usage Reports

The administration reports menu for the group(s) managed by the group manager is accessed by clicking on the 'Group Admin Reports' item in the LMS main menu. If the group manager is a member of more than one of the groups that are defined within the site, they are given the choice of selecting the groups which they would like to be included in the report.

Figure 5-2 shows the group selection menu that is displayed to a group manager who is a member of multiple groups: -

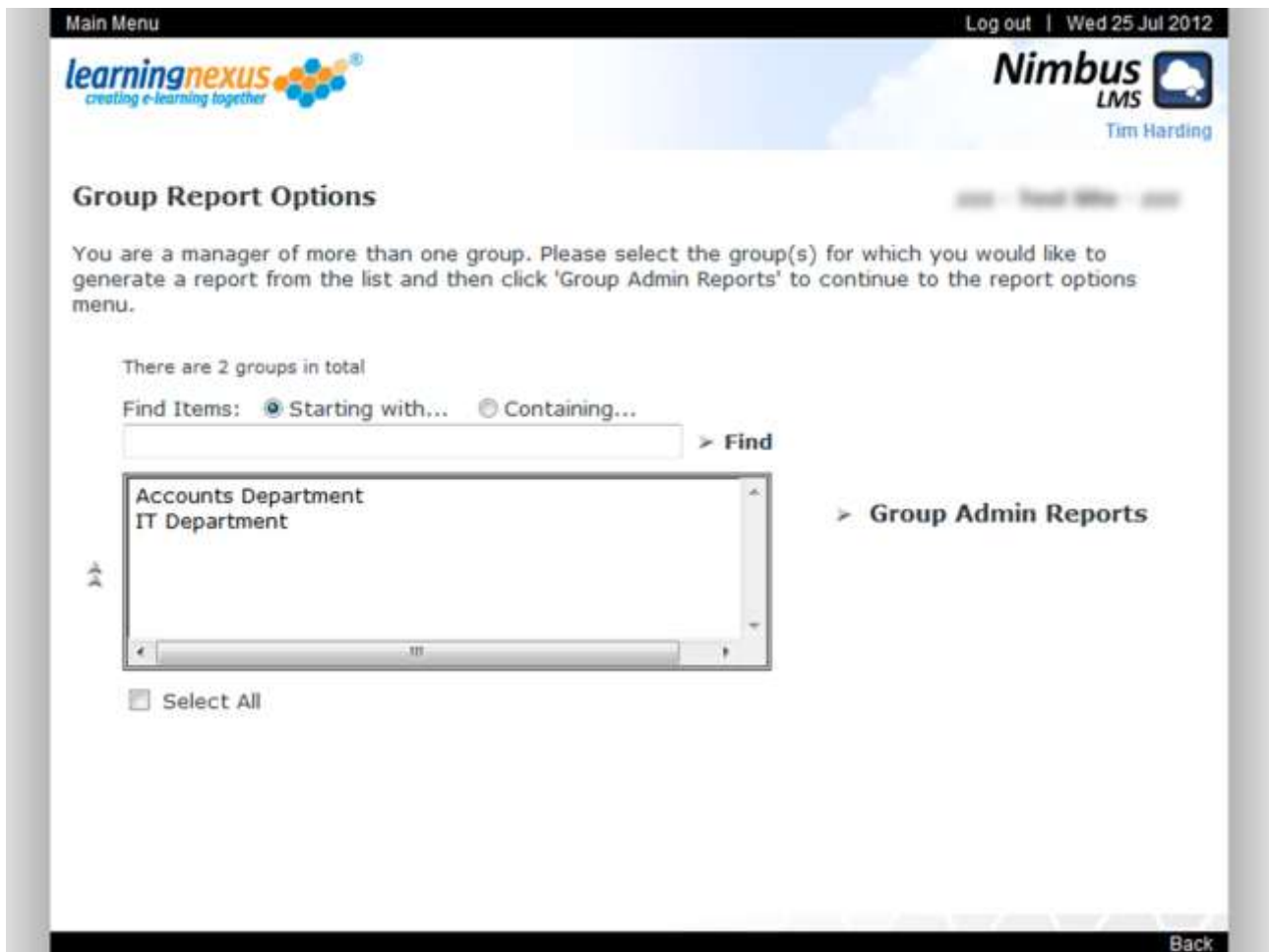


Figure 5-2: Group Selection Menu for Group Reports

The group selection menu consists of a list of all of the groups of which the group manager is a member, an option to select all of the items in the list and a 'Group Admin Reports' menu function. The entries in the list can be located using the 'Find Items' functions, are listed alphabetically and can be selected by using the usual click, control-click and shift-click keyboard / mouse combinations.

When the desired groups have been selected, the administration reports menu is accessed by clicking on the 'Group Admin Reports' item in the group selection menu.

This menu and the procedure for generating administration reports are explained in Chapter 6 – Generating Administration Reports on page 13 of this document.

Generating Group Risk Reports

The risk reports menu for the group(s) managed by the group manager is accessed by clicking on the 'Group Risk Reports' item in the LMS main menu. If the group manager is a member of more than one of the groups that are defined within the site, they are given the choice of selecting the groups which they would like to be included in the report in the same manner as for the group admin reports detailed above.

When the desired groups have been selected, the risk reports menu is accessed by clicking on the 'Group Risk Reports' item in the group selection menu.

This menu and the procedure for generating risk reports are explained in Chapter 7 – Generating Risk Assessment Reports on page 71 of this document.

6. Generating Administration Reports

The administration report menu can be accessed from several different areas of the LMS in order to generate learning activity reports for a site or for groups that are defined within the site.

Figure 6-1 shows the administration report menu: -

The screenshot shows the 'Administration Reports Menu' in the Nimbus LMS. At the top, there are navigation links for 'System Admin Menu' and 'Site Admin Menu', along with a 'Log out' link and the date 'Wed 25 Jul 2012'. The 'learningnexus' logo is on the left, and the 'Nimbus LMS' logo with the name 'Tim Harding' is on the right. The main heading is 'Administration Reports Menu'. Below this, a message asks the user to select their desired choices from the options below, choose the date period, and select the type of report. The options are organized into four sections: 'User Options', 'Course Options', 'Report Options', and 'Detail Options'. 'User Options' includes checkboxes for 'Show User ID', 'Show Active Users', and 'Show Retired Users', and radio buttons for 'Sort by User Name' and 'Sort by User ID'. 'Course Options' includes checkboxes for 'Show Course ID', 'Show Active Courses', and 'Show Retired Courses', and radio buttons for 'Sort by Course Title' and 'Sort by Course ID'. 'Report Options' includes a checkbox for 'Show Course Areas' and date pickers for 'Start Date' (Mar 2011) and 'End Date' (July 2012). 'Detail Options' includes checkboxes for 'Show Access Summary', 'Show Lesson Details', 'Show Objective Details', and 'Show Zero Usage in Exported Reports'. To the right of these sections is a list of report types: 'Report by User', 'Report by Course', 'Usage Type Report', 'Zero Usage Summary', 'Learning Tool Reports', 'Certificates By User' (with sub-options for 'Achievement' and 'Completion'), and 'Certificates By Course'. A 'Back' link is visible at the bottom right of the page.

Figure 6-1: Administration Report Menu

The administration reports menu consists of four sets of report options: -

- User Options

These settings determine if the user ID is to be shown in the report and if the users are to be sorted by name or by ID. The default settings are that the user ID is not shown and the users are sorted by name.

- Course Options

These settings determine if the course ID is to be shown in the report and if the courses are to be sorted by title or by ID. The default settings are that the course ID is not shown and the courses are sorted by title.

- Report Options

These settings determine if the course subject areas are to be shown in the report and the date period during which learning activities are to be reported on. The default settings are that the course areas are not shown and the date period is the entire period for which learning activity data is available.

- Detail Options

A 'Report by User' or a 'Report by Course' can be generated with four possible levels of detail and can be exported to a CSV (Comma Separated Value) text file which can be opened with a spreadsheet program such as Microsoft Excel. The settings in this group determine the level of detail displayed in these reports.

The administration reports menu also contains the following menu items: -

- Report by User

This menu item generates a report detailing the learning activities for each of the selected users; i.e. the courses that have been used by each user.

- Report by Course

This menu item generates a report detailing the learning activities for each of the selected courses; i.e. the users that have used each course.

- Usage Type Summary

This menu item generates a report summarising the type of usage (initial, in-progress, completion or post-completion) of all of the courses by all of the users that are allocated to the site or group(s).

- Zero Usage Summary

This menu item generates a report summarising all of the users that are allocated to the site or group(s) that have not used any of the courses that are allocated to the site or group(s) within the reporting period.

- Learning Tool Reports

This menu item generates a report detailing the results of the available learning tools for each of the selected users. This menu item is only available if any of the optional LMS learning tools have been installed and assigned to the site.

- Certificates by User

This menu item has two sub-menu items: -

- Achievement
- Completion

These sub-menu items generate a report detailing the courses for which each of the selected users has qualified for a certificate of achievement or a certificate of completion.

- Certificates by Course

This menu item has two sub-menu items: -

- Achievement
- Completion

These sub-menu items generate a report detailing the users who have qualified for a certificate of achievement or a certificate of completion for each of the selected courses.

Selecting any of the menu items listed above, except for the 'Usage Type Summary' or 'Zero Usage Summary' menu items and the 'Learning Tool Reports' menu item, accesses the administration report options menu. Figure 6-2 shows the administration report options menu: -

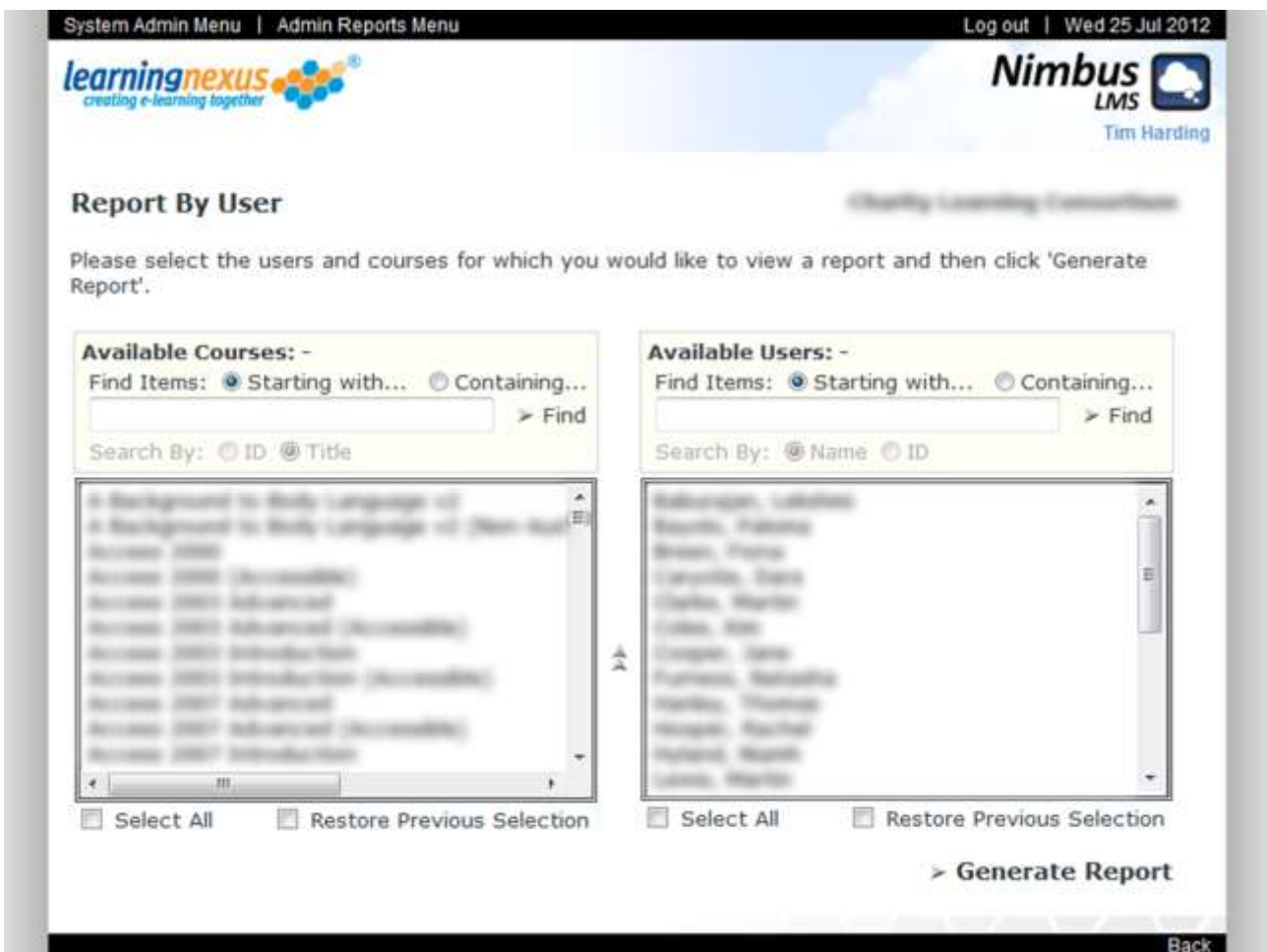


Figure 6-2: Administration Report Options Menu

The administration report options menu consists of two lists; each of which has an option to select all of the entries in the list. The 'Available Courses' list shows all of the courses that are allocated to the site or group(s) for which the desired report is to be generated. The 'Available Users' list shows all of the users who are members of the site or group(s) for which the desired report is to be generated. Both lists are formatted and sorted using the options selected in the previous administration reports menu.

Items in the lists can be located using the 'Find Items' boxes and can be selected by using the usual click, control-click and shift-click keyboard / mouse combinations. If the current user has previously selected a set of courses and users in order to generate a report and they have not since exited the administration reports section then an option to restore the previous

selection is also displayed under each list. When the courses and users to be included in the report have been selected, the report is generated by clicking on the 'Generate Report' option.

Learning Activity Reports

Access Summary Report

Figure 6-3 shows a sample access summary report: -

User Name	Total Courses Used	First Date Used	Last Date Used	Total Duration (hh:mm:ss)	Total Complete
1. Bill, Murray	1	23/03/2012	30/03/2012	00:04:23	0
2. Barbara, Smith	1	01/05/2012	02/05/2012	01:22:45	1
3. Nigel, Lyon	3	05/04/2012	05/04/2012	01:01:43	1
4. Sarah, Lee	4	10/07/2012	10/07/2012	00:47:42	0
5. Stephen, Roberts	11	13/03/2012	26/06/2012	02:54:06	2
6. Catherine, Jones	2	02/07/2012	02/07/2012	00:18:58	1
Totals:	22	13/03/2012	10/07/2012	06:29:37	5

Figure 6-3: Sample Access Summary Report

An access summary report shows the following information for each of the selected users / courses for which usage data has been recorded during the reporting period: -

- The total number of the selected courses that the user has accessed during the reporting period / the total number of the selected users who have accessed the course during the reporting period.
- The earliest date within the reporting period on which the user accessed one of the selected courses / the course was accessed by one of the selected users.
- The latest date within the reporting period on which the user accessed one of the selected courses / the course was accessed by one of the selected users.
- The total length of time during the reporting period that the user spent accessing the selected courses / was spent accessing the course by the selected users.
- The total number of the selected courses that the user has completed during the reporting period / the total number of the selected users who have completed the course during the reporting period. A course is deemed to be completed if the user has passed, failed or completed all of the lessons within the course.

These values are also totalled across all of the selected users / courses at the end of the report.

A detailed learning activity report can show up to three levels of detail for the learning activities of each of the selected users / courses. Each of these levels of detail is explained below: -

Course Information

This is the default level of detail for a learning activity report.

If the report is generated by user, the section of the report pertaining to each of the selected users will contain a single course information entry for each of the selected courses that the user has accessed during the reporting period.

If the report is generated by course, the section of the report pertaining to each of the selected courses will contain a single course information entry for each of the selected users who have accessed the course during the reporting period.

A course information entry shows the following for the user / course: -

- The course title / user name.
- The status of the user's learning activities for the course. Possible status values are: -
 - Not Attempted
The user has accessed at least one of the lessons within the course but has not undertaken any learning activities.
 - Attempted x of y
The user has undertaken learning activities in x lessons of the course and the course contains a total of y lessons.
 - Complete
The user has passed, failed or completed all of the lessons within the course.
- The earliest date within the reporting period on which the user accessed the course.
- The latest date within the reporting period on which the user accessed the course.
- The total length of time during the reporting period that the user spent accessing the course.
- The date on which the user first accessed any of the lessons in the course.
- The date on which the user completed the course (if appropriate).

Lesson Information

Each course information entry can optionally contain a single lesson information entry for each of the lessons within the course for which a learning activity has been recorded during the reporting period.

A lesson information entry shows the following for the user / lesson: -

- The lesson title.
- The number of times that the user has accessed the lesson during the reporting period.

- The first score during the reporting period that the user achieved on the scored component of the lesson. This value is blank if a lesson does not contain a scored component. The score is formatted as percentage value followed by the score achieved and the maximum score possible. E.g. 86% (43 / 50).
- The last score during the reporting period that the user achieved on the scored component of the lesson. This value is blank if a lesson does not contain a scored component. The score is formatted as percentage value followed by the score achieved and the maximum score possible. E.g. 86% (43 / 50).
- The best score during the reporting period that the user achieved on the scored component of the lesson. This value is blank if a lesson does not contain a scored component. The score is formatted as percentage value followed by the score achieved and the maximum score possible. E.g. 86% (43 / 50).
- The status of the user's learning activity for the lesson. Possible status values are: -
 - Not Attempted
The user has accessed the lesson but has not undertaken any learning activities.
 - Incomplete
The user has undertaken learning activities within the lesson but has not yet completed it.
 - Complete
The user has completed the lesson. The lesson is deemed to be complete if the user has passed, failed or completed all of the objectives defined within the lesson.
 - Passed
The lesson has a scored component and the user has achieved a score greater than the associated mastery score.
 - Failed
The lesson has a scored component and the user has achieved a score less than the associated mastery score.
- The earliest date within the reporting period on which the user accessed the lesson.
- The latest date within the reporting period on which the user accessed the lesson.
- The total length of time during the reporting period that the user spent accessing the lesson.
- The date on which the user first accessed the lesson.
- The date on which the user completed the lesson (if appropriate).

Objective Information

Each lesson information entry can optionally contain a single objective information entry for each of the objectives that are defined within the lesson for which a learning activity has been recorded during the reporting period.

Note: It is not compulsory for courseware vendors to define objectives within a lesson and therefore, not all lessons will have associated objective information.

An objective information entry shows the following for the user / objective: -

- The first score during the reporting period that the user achieved on the scored component of the objective. This value is blank if the objective does not contain a scored component. The score is formatted as a percentage value followed by the score achieved and the maximum score possible. E.g. 86% (43 / 50).
- The last score during the reporting period that the user achieved on the scored component of the objective. This value is blank if the objective does not contain a scored component. The score is formatted as a percentage value followed by the score achieved and the maximum score possible. E.g. 86% (43 / 50).
- The best score during the reporting period that the user achieved on the scored component of the objective. This value is blank if the objective does not contain a scored component. The score is formatted as a percentage value followed by the score achieved and the maximum score possible. E.g. 86% (43 / 50).
- The status of the user's learning activity for the objective. Possible status values are: -
 - Not Attempted
The user has accessed the objective but has not undertaken any learning activities.
 - Incomplete
The user has undertaken learning activities within the objective but has not yet completed it.
 - Complete
The user has completed the objective.
 - Passed
The objective has a scored component and the user has achieved a score greater than the associated mastery score.
 - Failed
The objective has a scored component and the user has achieved a score less than the associated mastery score.
- The objective title.

Usage Type Summary Report

Figure 6-5 shows an example of a Usage Type Summary Report: -

Administration Reports Usage Type Report							
Report Generated By: Tim Harding at 15:14:54 on 25 July 2012 Report Options: Sort By User Name Sort By Course Title Start Date: June 2012 End Date: July 2012.							
Initial Usage							
User Name	Course Title	Lesson Title	Duration	Attempts	First Used	Last Used	Date Started
	Handling Violence and Aggression at Work	Handling Violence and Aggression at Work	00:44:56	1	10/07/2012	10/07/2012	10/07/2012
	Personal Safety in Other People's Homes and Premises	Personal Safety in Other People's Homes and Premises	00:02:41	1	10/07/2012	10/07/2012	10/07/2012
	An Overview of Performance Appraisal v2	An Overview of Performance Appraisal	00:00:40	1	02/07/2012	02/07/2012	02/07/2012
2 Users	3 Courses	3 Lessons	00:48:17				
In-Progress Usage							
User Name	Course Title	Lesson Title	Duration	Attempts	First Used	Last Used	Date Started
	The Bribery Act 2010	Identifying and Avoiding Bribery in Organisations	00:20:56	1	26/06/2012	26/06/2012	23/03/2012
1 Users	1 Courses	1 Lessons	00:20:56				
Completion Usage							
User Name	Course Title	Lesson Title	Duration	Attempts	First Used	Last Used	Date Completed
	An Overview of Performance Appraisal v2 (Non-Audio)	An Overview of Performance Appraisal	00:18:18	1	02/07/2012	02/07/2012	02/07/2012
1 Users	1 Courses	1 Lessons	00:18:18				
Post-Completion Usage							
User Name	Course Title	Lesson Title	Duration	Attempts	First Used	Last Used	Date Completed
0 Users	0 Courses	0 Lessons	00:00:00				
Overall Totals							
4 Users	5 Courses	5 Lessons	01:27:31				

Figure 6-5: Sample Usage Type Summary Report

A Usage Type Summary Report summarises the type of usage within the reporting period of all of the courses that are allocated to the reporting site or group(s) by all of the users that are members of the reporting site or group(s). The report is divided into four separate areas: -

- Initial Usage

This area shows a summary of the usage of lessons during the reporting period that have not already been started by users before the reporting period.

- In-Progress Usage

This area shows a summary of the usage of lessons during the reporting period that have already been started by users before the reporting period but have not yet been completed.

- Completion Usage

This area shows a summary of the usage of lessons within the reporting period that have been completed by users during the reporting period.

- Post-Completion Usage

This area shows a summary of the usage of lessons during the reporting period that have already been completed by users before the reporting period (i.e. refresher training etc.).

Each of the entries in the four areas of the report shows the following information: -

- The users name.
- The course title.
- The lesson title.
- The total length of time during the reporting period that the user spent accessing the lesson.
- The number of times that the user accessed the lesson during the reporting period.
- The earliest date within the reporting period on which the user accessed the lesson.
- The latest date within the reporting period on which the user accessed the lesson.
- The date on which the lesson was first used / completed by the user (as appropriate).

The total length of time during the reporting period that the users spent accessing the lessons is also totalled at the end of each of the four report areas and also at the end of the report. The figure for the total duration of usage at the end of the report therefore represents the total length of time spent on learning activities by the entire reporting site or group(s) during the reporting period.

Zero Usage Summary Report

Figure 6-6 shows an example of a Zero Usage Summary Report: -

Close | Print | Save | E-mail | Export

Administration Reports

Zero Usage Summary

Report Generated By: Tim Harding at 15:29:33 on 25 July 2012
Report Options: Sort By User Name; Start Date: June 2012; End Date: July 2012.

The following users have not used any of the available courses during the selected time period: -

User Name	Email Address
1. Anna, Margaret	
2. Bill, Tracy	
3. Bob, David	
4. Carol, Susan	
5. John, Tom	john@hardingreport.com.au
6. Jane, Bob	
7. Michael, Robert	robert@hardingreport.com.au
8. William, Mark	mark@hardingreport.com.au
9. Richard, James	
10. Sarah, John	
11. Matthew, John	john@hardingreport.com.au

Figure 6-6: Sample Zero Usage Summary Report

A Zero Usage Summary Report produces a list of all of the users that are allocated to the reporting site or group(s) who have not used any of the courses that are allocated to the reporting site or group(s) within the reporting period.

Learning Tool Reports

The Learning Tool Reports menu item is only available if any of the optional learning tool LMS add-ons have been installed and assigned to the site. Selecting the Learning Tool Reports menu item accesses the Administration Learning Tool Reports menu.

Figure 6-7 shows the Administration Learning Tool Reports menu: -

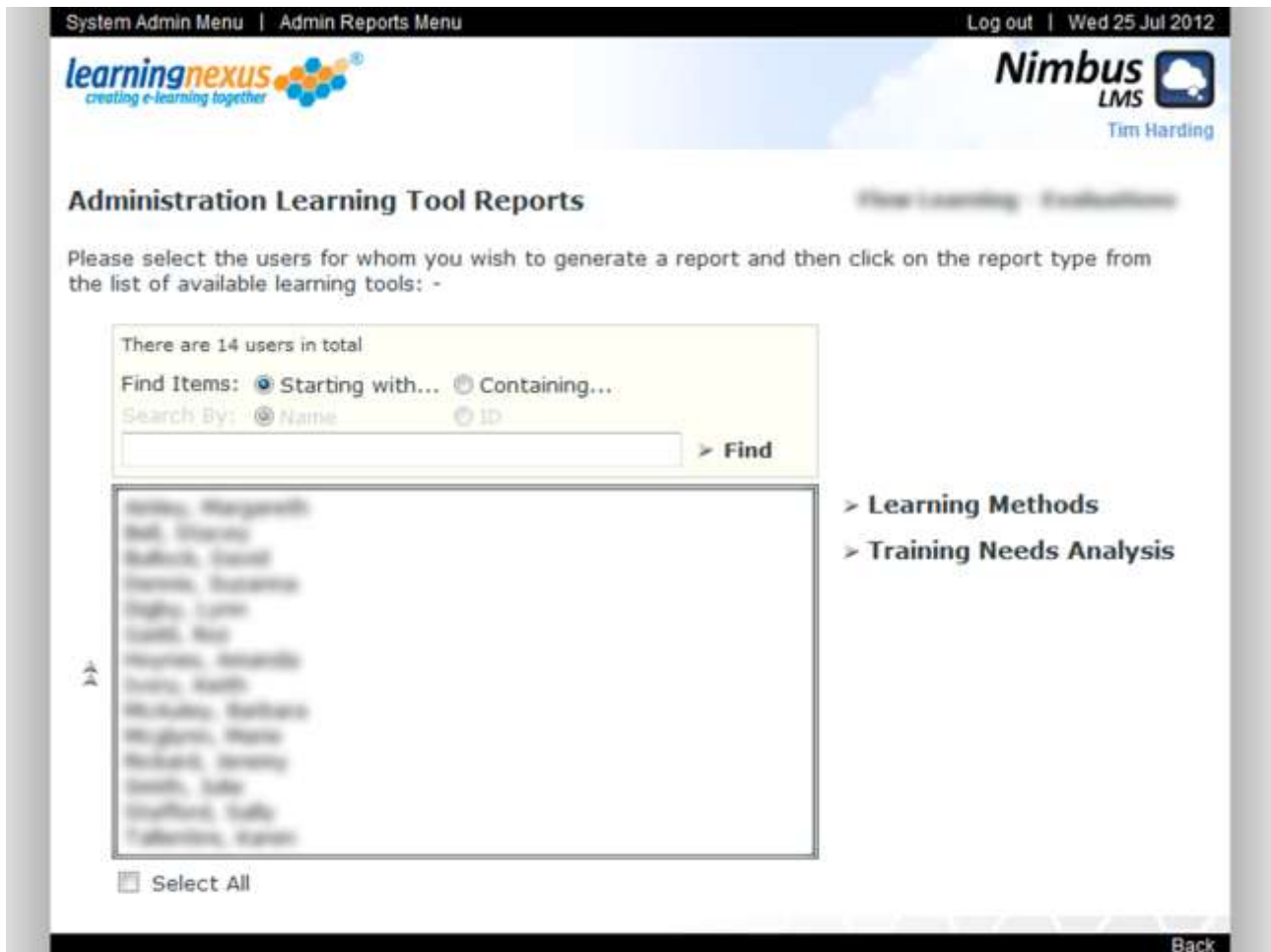


Figure 6-7: Administration Learning Tool Reports Menu

The administration learning tool reports menu consists of an 'Available Users' list which shows all of the users who are members of the site or group(s) for which the desired report is to be generated, a 'Select All' check box which can be used to select / deselect all of the users in the 'Available Users' list and a separate menu item for each of the reports that are available for each of the installed learning tools. The 'Available Users' list is formatted and sorted using the options selected in the previous administration reports menu and items in the list can be located using the 'Find Items' functions.

Items in the 'Available Users' list can be selected by using the usual click, control-click and shift-click keyboard / mouse combinations. When the users for which the report is to be generated have been selected, the report is generated by clicking on the appropriate report menu item. All of the learning activity reports can be printed and saved by using the appropriate items on the menu bar at the top of the report.

Learning Methods

Learning Methods is an optional LMS add-on tool that has been designed to: -

- Show which learning methods work best for each person
- Reveal individual dislikes for any learning methods
- Help training managers to match learning methods to learning needs
- Help trainers to avoid mismatching individuals and learning methods
- Improve cost effective investment in training through a focused, researched matching of learning methods to learning needs
- Help to avoid or minimize over and under spending of training resources

The Learning Methods report menu is accessed by clicking the 'Learning Methods' element in the administration learning tool reports menu.

Figure 6-8 shows the Learning Methods report menu: -

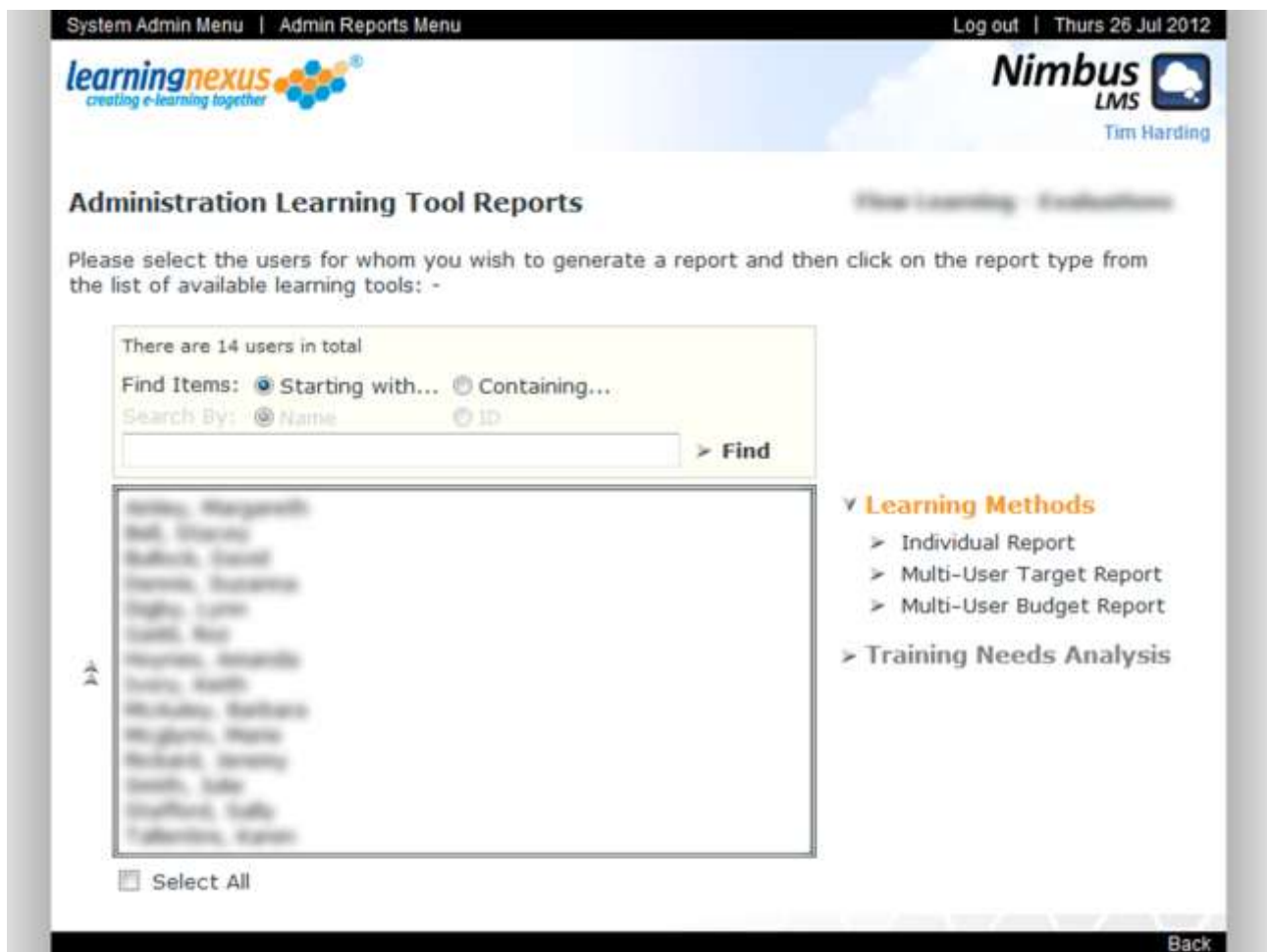


Figure 6-8: Learning Methods Report Menu

There are three types of reports available for the Learning Methods tool: -

- Individual Report
This report shows the preferred learning methods for a single user derived from the selected individual's responses to the Learning Methods questionnaire.

- Multi-User Target Report

This report identifies the most appropriate learning method for each of the selected users derived from their most recent responses to the Learning Methods questionnaire.

- Multi-User Budget Report

This report identifies the overall learning method preferences for the selected users and is derived by averaging their most recent responses to the Learning Methods questionnaire.

Individual Report

Figure 6-9 shows a sample Learning Methods Individual Report: -

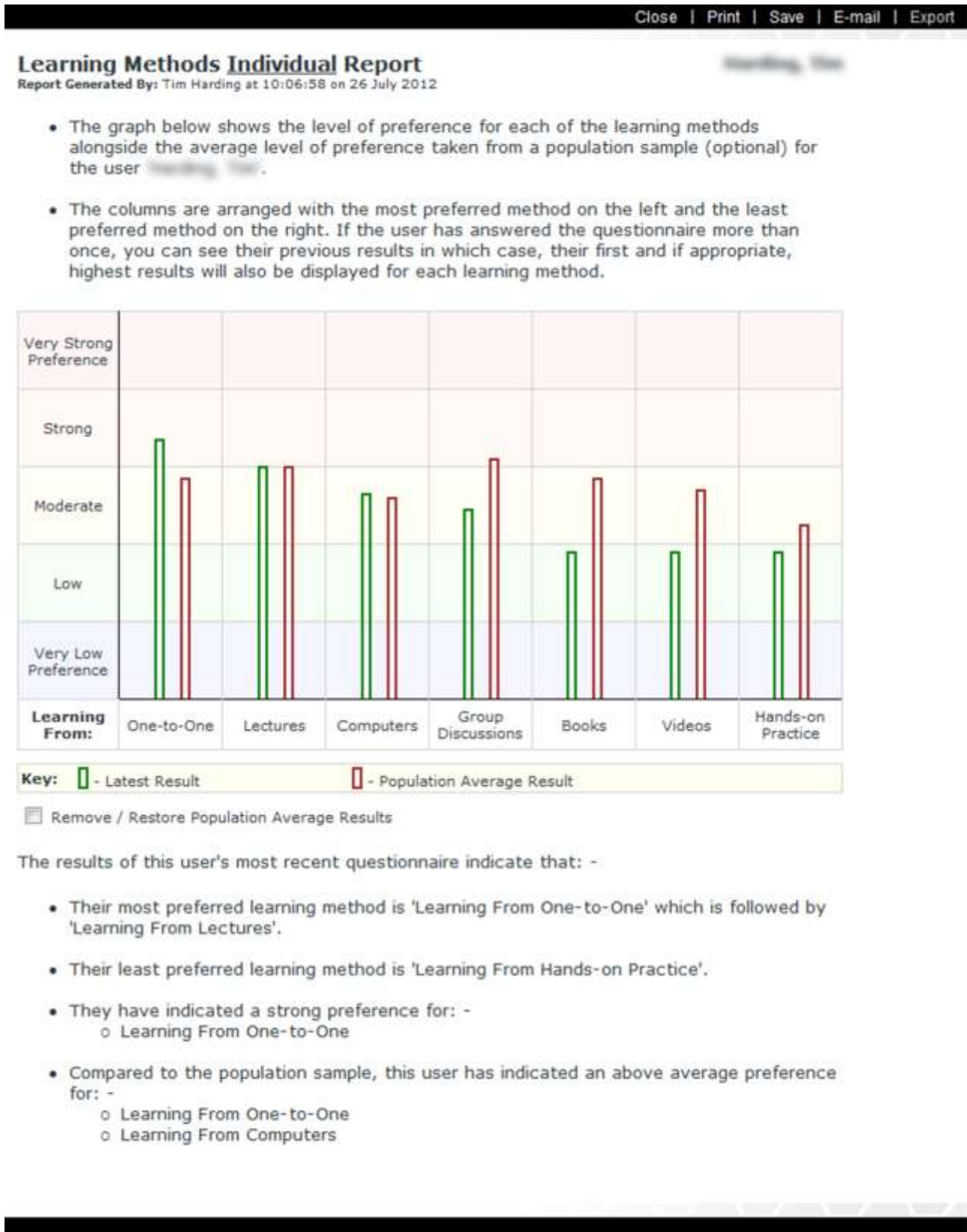


Figure 6-9: Sample Learning Methods Individual Report

Multi-User Target Report

Figure 6-10 shows a sample Learning Methods Target Report: -

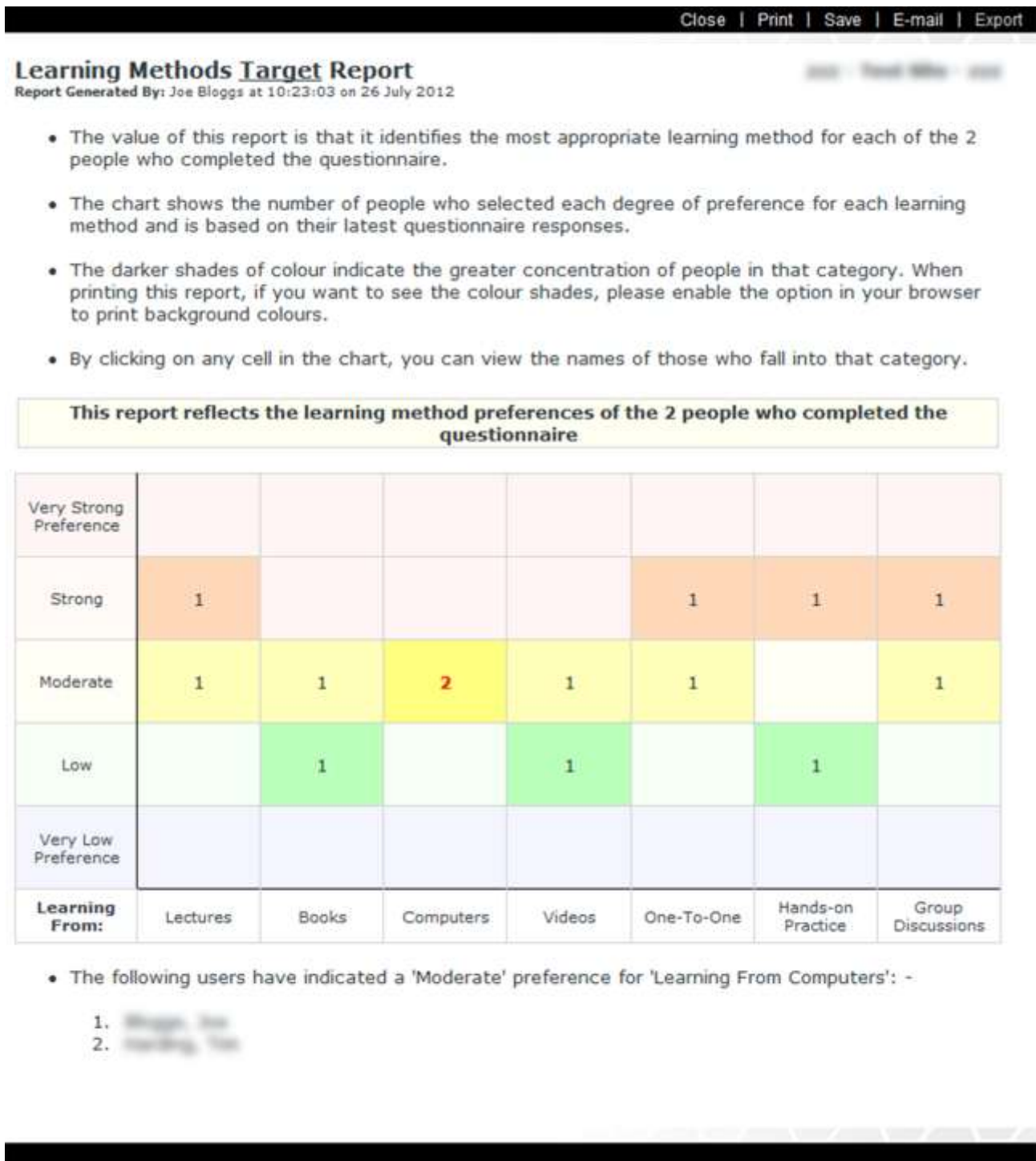


Figure 6-10: Sample Learning Methods Target Report

Multi-User Budget Report

Figure 6-11 shows a sample Learning Methods Budget Report: -

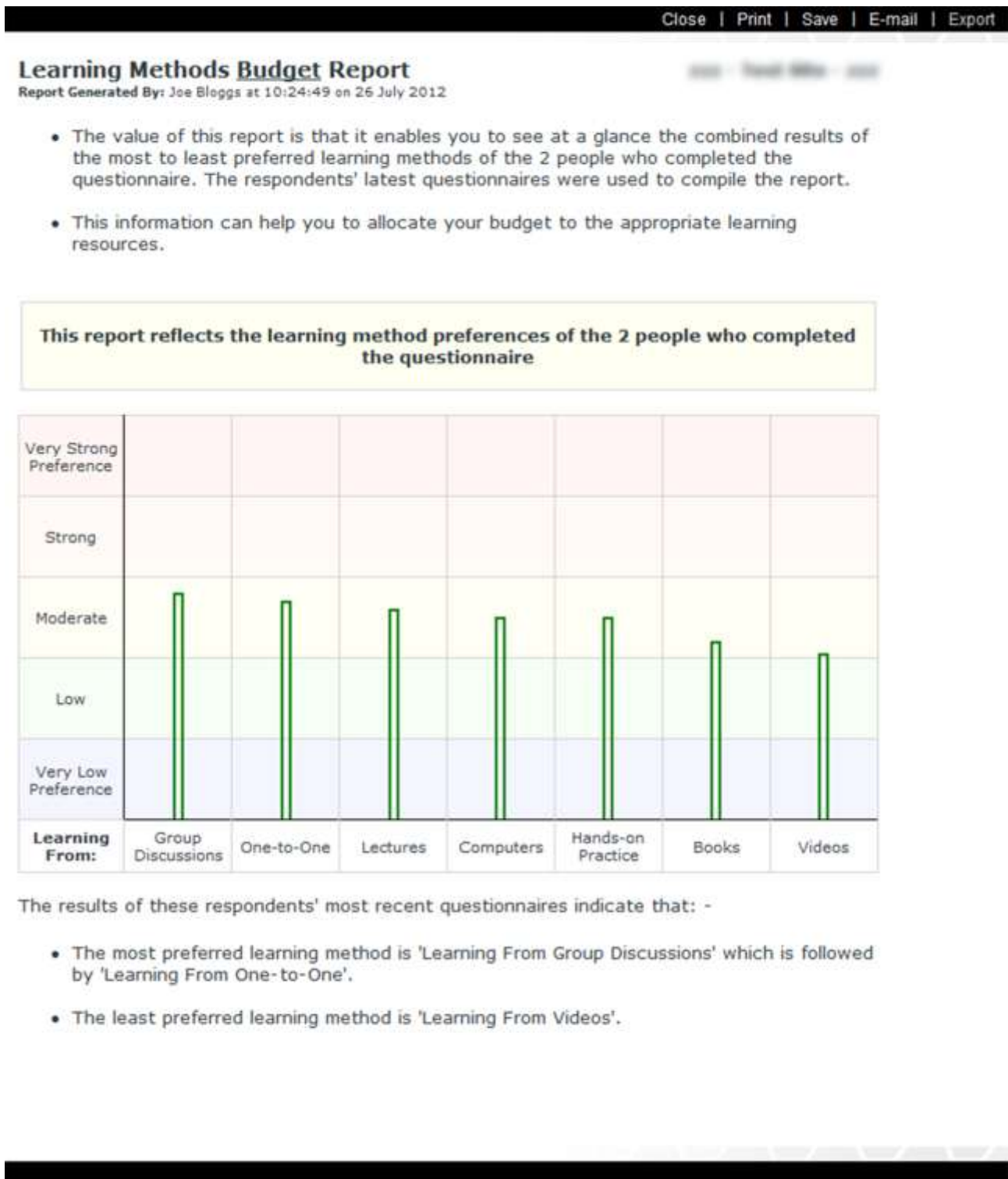


Figure 6-11: Sample Learning Methods Budget Report

Training Needs Analysis

Training Needs Analysis is an optional LMS add-on tool that has been designed to: -

- Allow users to assess the importance of topics to their job effectiveness
- Allow users to rate their current competence in these topics
- Calculate the level of training need for these topics

The Training Needs Analysis report menu is accessed by clicking the 'Training Needs Analysis' element in the administration learning tool reports menu.

Figure 6-12 shows the Training Needs Analysis report menu: -

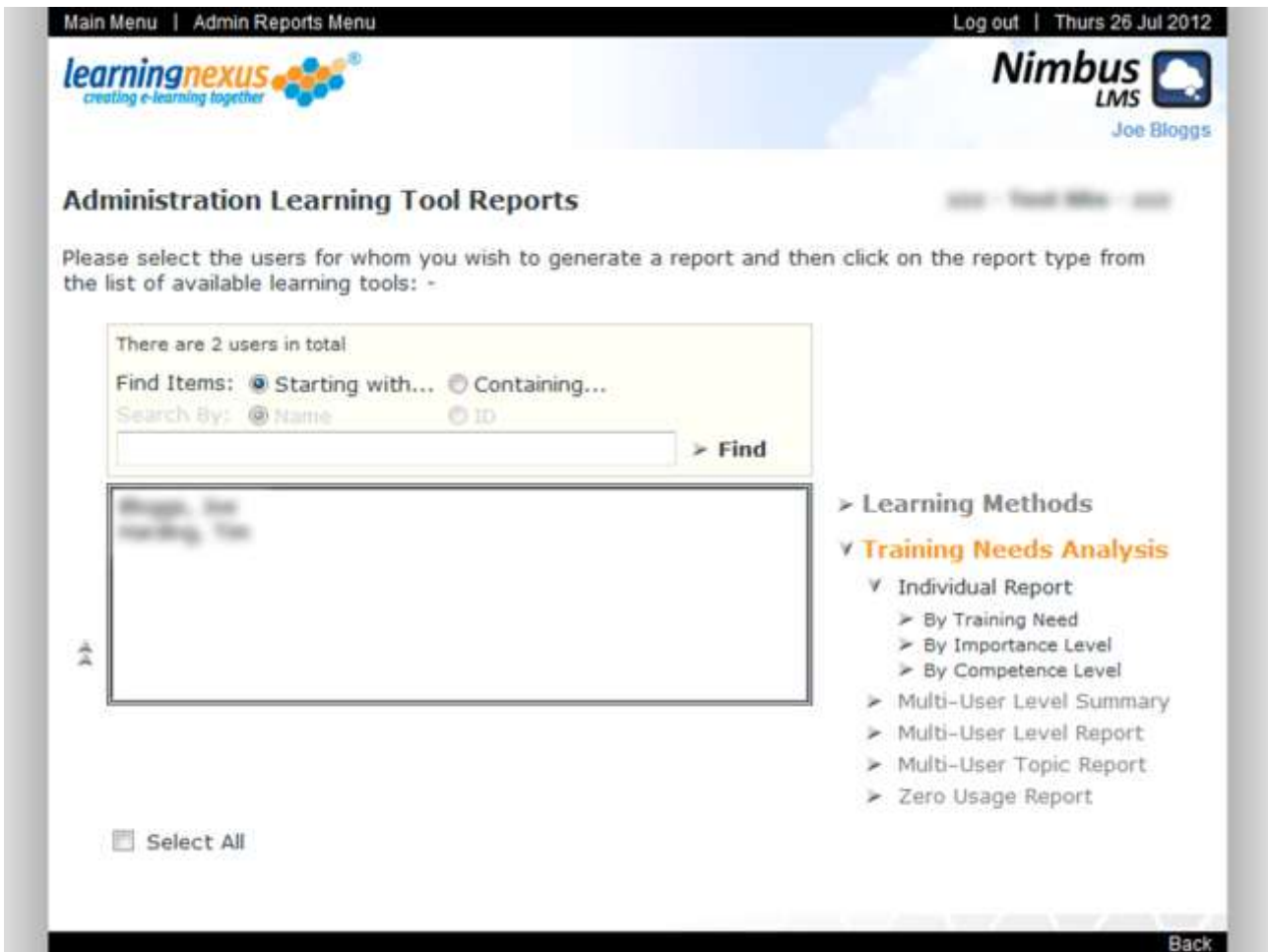


Figure 6-12: Training Needs Analysis Report Menu

There are five types of reports available for the Training Needs Analysis tool: -

- Individual Report

This report shows the level of training need, level of importance for job effectiveness and level of current competence for each of the topics in all of the subject areas that the selected user has chosen, derived from the selected individual's responses to the Training Needs Analysis questionnaires.

- Multi-User Level Summary

This report shows the number of the selected users for whom the level of training need (or optionally the level of importance for job effectiveness or level of current competence) falls into the selected range for each of the topics.

- Multi-User Level Report

This report shows all of the topics for which the level of training need (or optionally the level of importance for job effectiveness or level of current competence) for all of the selected users falls into the selected range.

- Multi-User Topic Report

This report shows the level of training need, level of importance for job effectiveness and level of current competence for all of the selected users for the selected topic.

- Zero Usage Report

This report shows all of the selected users who have not completed a Training Needs Analysis for any of the available subject areas.

Each of these reports except the Zero Usage Report has three variations which determine the order in which the information is arranged in the report: -

- By Training Need

This option arranges the reports by level of training need followed by level of importance for job effectiveness and then level of current competence.

- By Importance Level

This option arranges the reports by level of importance for job effectiveness followed by level of training need and then level of current competence.

- By Competence Level

This option arranges the reports by level of current competence followed by level of training need and then level of importance for job effectiveness.

Individual Report

Figure 6-13 shows a sample Training Needs Analysis individual report: -

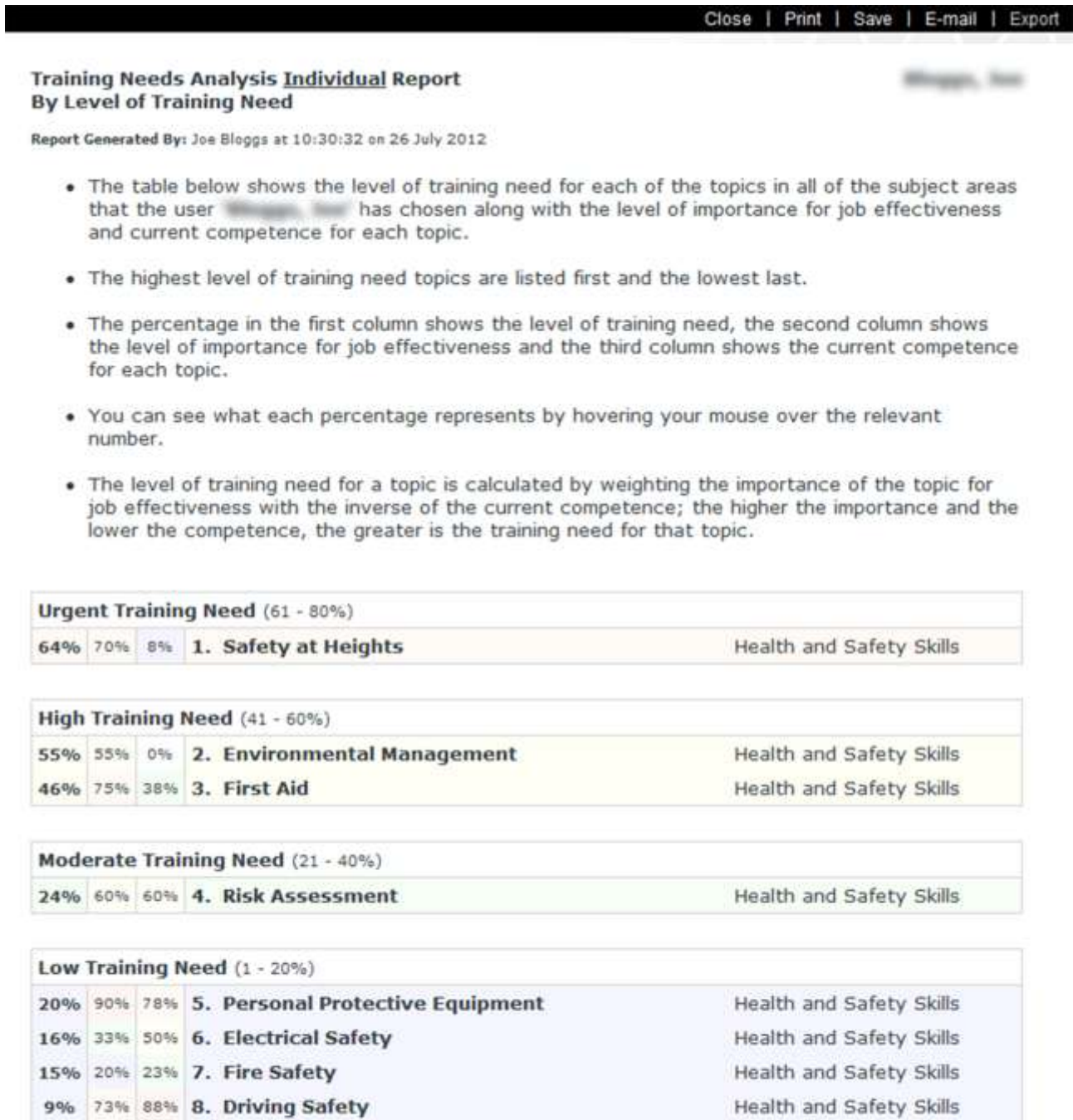


Figure 6-13: Sample Training Needs Analysis Individual Report

Multi-User Level Summary

Figure 6-14 shows a sample Training Needs Analysis Multi-User Level Summary Report. In this case, the report has been generated using the 'By Training Need' and 'High Training Need' options: -

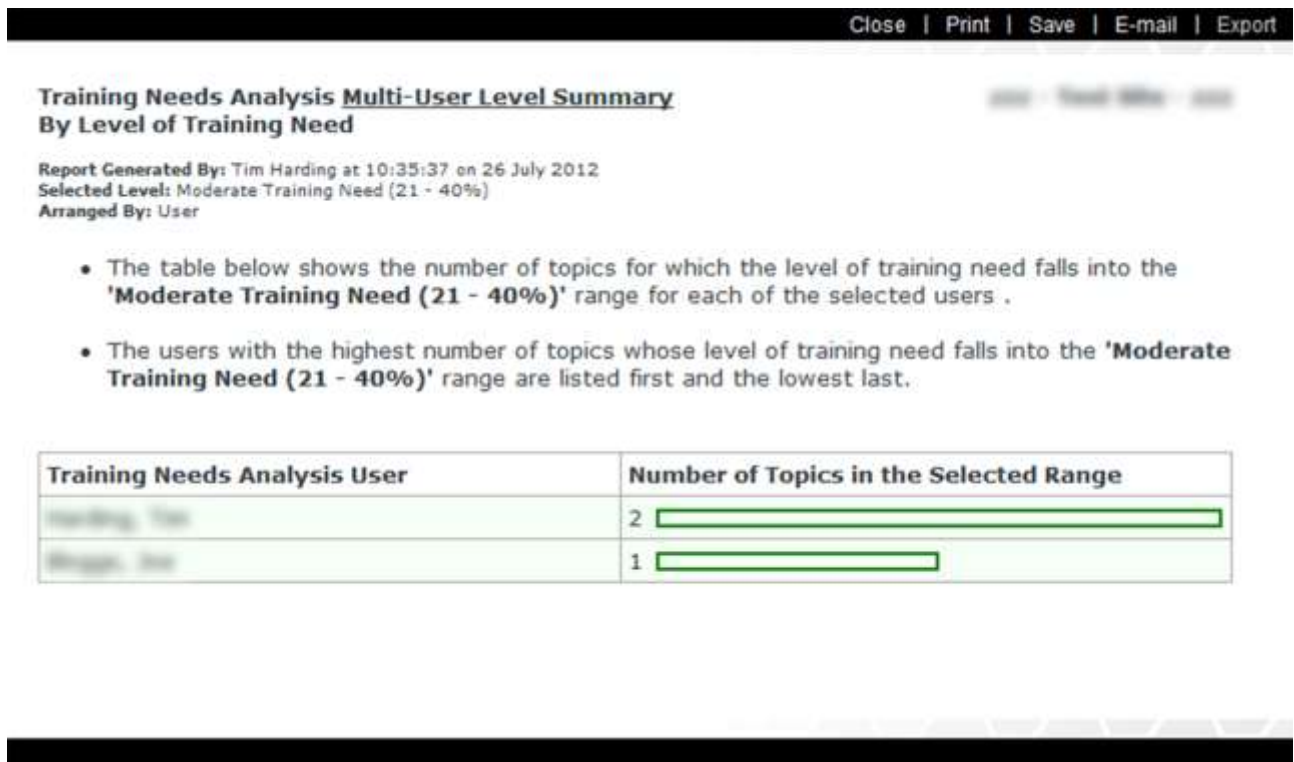


Figure 6-14: Sample Training Needs Analysis Multi-User Level Summary Report

Multi-User Level Report

Figure 6-15 shows a sample Training Needs Analysis Multi-User Level report: -

Close | Print | Save | E-mail | Export

Training Needs Analysis Multi-User Level Report

2012 - 2012

By Level of Training Need

Report Generated By: Tim Harding at 10:39:10 on 26 July 2012
 Selected Level: Moderate Training Need (21 - 40%)
 Arranged By: User

- The table below shows all of the topics for which the level of training need for the selected users falls into the '**Moderate Training Need (21 - 40%)**' range.
- The highest level of training need topics are listed first and the lowest last for each user.
- For each topic, the percentage in the first column shows the level of training need, the second column shows the level of importance for job effectiveness and the third column shows the current competence for that topic.
- You can see what each percentage represents by hovering your mouse over the relevant number.
- The level of training need for a topic is calculated by weighting the importance of the topic for job effectiveness with the inverse of the current competence in that topic; the higher the importance and the lower the competence, the greater is the training need for that topic.

1. <u>Weggs, Inc</u>			
24%	60%	60%	1. Risk Assessment
			Health and Safety Skills

2. <u>Harding, Inc</u>			
31%	73%	58%	1. Fire Safety
			Health and Safety Skills
27%	43%	38%	2. Environmental Management
			Health and Safety Skills

Figure 6-15: Sample Training Needs Analysis Multi-User Level Report

Multi-User Topic Report

Figure 6-16 shows a sample Training Needs Analysis Multi-User Topic report: -

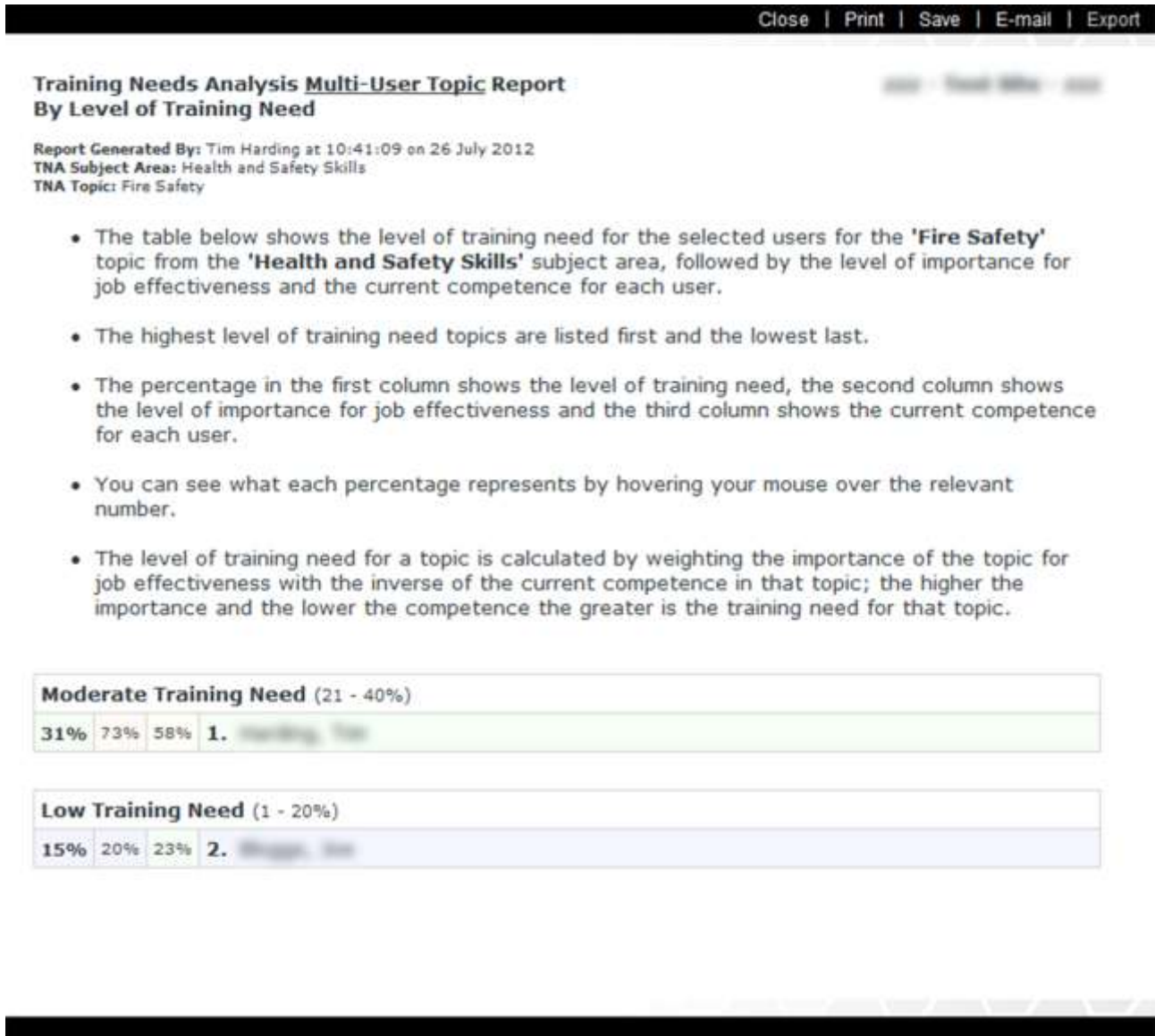


Figure 6-16: Sample Training Needs Analysis Multi-User Topic Report

Zero Usage Report

Figure 6-17 shows a sample Training Needs Analysis Zero Usage Report: -

Training Needs Analysis <u>Zero Usage</u> Report		View Learning - Evaluation
Report Generated By: Tim Harding at 10:43:54 on 26 July 2012		
The table below shows all of the selected users who have not yet completed a Training Needs Analysis for any of the available subject areas.		
User Name	Email Address	
1. Anna, Margaret	-	
2. Bill, Nancy	-	
3. Bob, David	-	
4. Carol, Susan	-	
5. John, Lynn	lynn@butterfly.com	
6. Jack, Bob	bob@butterfly.com	
7. James, Amanda	amanda@butterfly.com	
8. Jane, Bob	-	
9. Michael, Barbara	barbara@butterfly.com	
10. William, Mark	mark@butterfly.com	
11. Richard, Jerry	-	
12. Sally, John	-	
13. Matthew, Sally	sally@butterfly.com	
14. Rebecca, Karen	karen@butterfly.com	

Figure 6-17: Sample Training Needs Analysis Zero Usage Report

Certificate Report

Figure 6-18 shows an example of the Achievement Certificates by User report: -

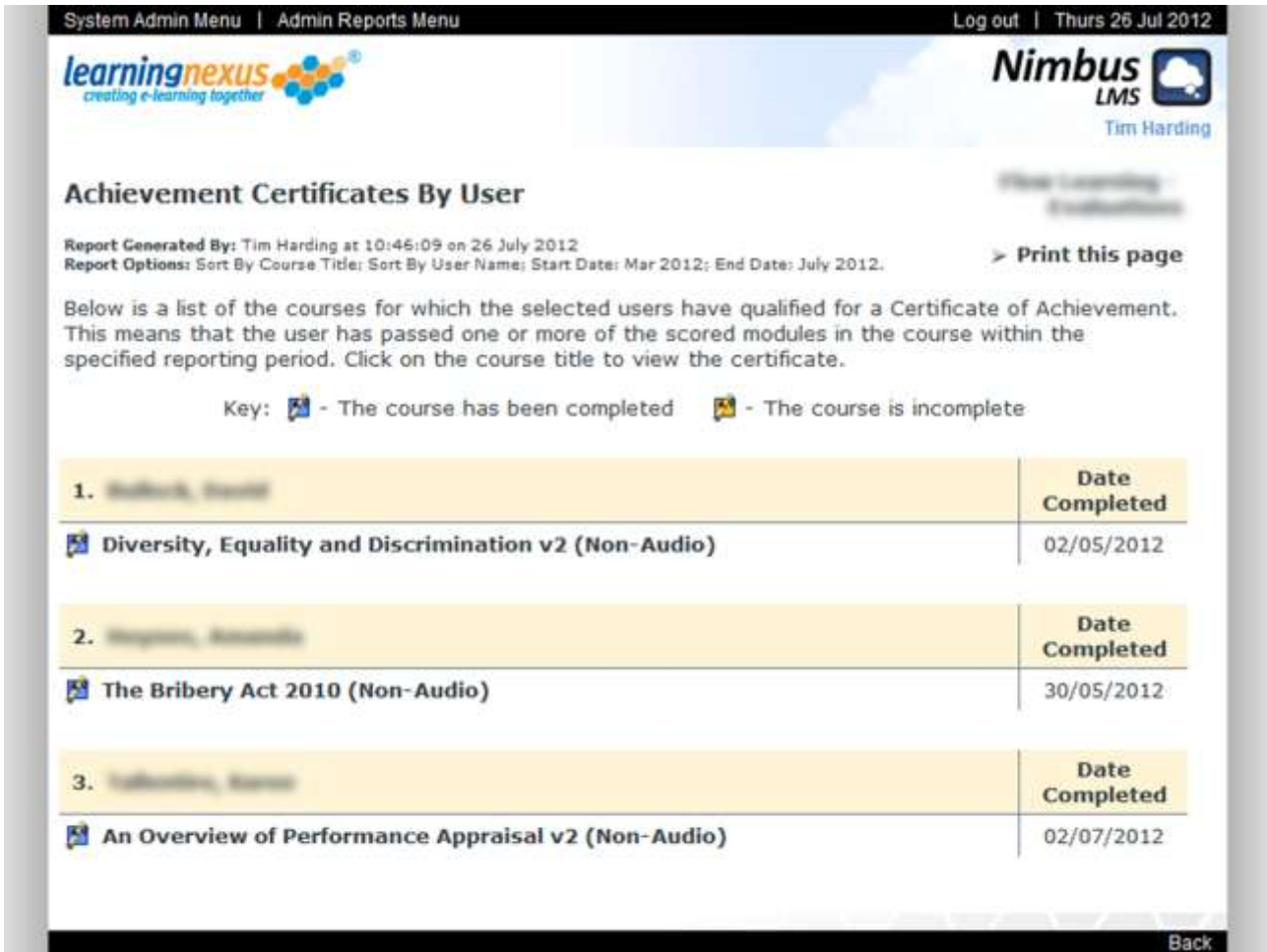


Figure 6-18: Achievement Certificates by User Example


If the certificate report is generated by user, the section of the report pertaining to each of the selected users will show a list of all of the selected courses for which the user has qualified for a certificate within the reporting period and the date on which the achievement or completion occurred.


If the certificate report is generated by course, the section of the report pertaining to each of the selected courses will show a list of all of the selected users that have qualified for a certificate within the reporting period and the date on which the achievement or completion occurred.

Two types of certificate report can be generated: -

- Achievement Certificates

A user qualifies for a certificate of achievement if they have passed one or more of the scored lessons within the course. The entries in this report are preceded by a coloured certificate icon which indicates whether or not the user has also completed the course.

 - indicates that the user has also completed the course

 - indicates that the user has not yet completed the course

- Completion Certificates

A user qualifies for a certificate of completion if they have completed all of the lessons within the course but have not qualified for an achievement certificate either because the course does not contain any scored lessons or the user has failed to pass any of the scored lessons within the course. The entries in this report are preceded by a coloured certificate icon which indicates which of these conditions applies.



- indicates that the course does not contain any scored lessons



- indicates that the user has failed to pass any of the scored lessons

A certificate is generated by clicking on the appropriate course title / user name in the certificate report and the certificate can be printed and saved by using the appropriate items in the menu bar at the top of the certificate. If the settings for the LMS site specify that the customisable logos are displayed on the certificate, the option to save the certificate is disabled.

Figure 6-19 shows an example of a Certificate of Achievement with the site options for showing the certificate border and the customisable logos enabled: -

Certificate of Achievement

Safeguarding Children

This is to certify that on 26/07/2012

[Name]

completed this course with an average score of

80%

after attempting the 1 scored lesson(s) in this course.

26 July 2012

Authorised Signatory

learningnexus
Your logo could
go here

learningnexus 
creating e-learning together

Conducted by Learning Nexus Ltd.

Figure 6-19: Certificate of Achievement Example

7. Generating Risk Assessment Reports

The optional LMS 'Risk Assessment Module' allows LMS administrators and group managers to perform tasks and generate reports that are specific to Health and Safety Risk Assessments. This module also allows notes to be created and stored against specific users' risk records detailing the precise nature of the risk, actions taken to resolve the risk etc.

The risk reports menu can be accessed from several different areas of the LMS in order to generate risk assessment reports for a site or for groups that are defined within the site.

Figure 7-1 shows the risk reports menu: -

The screenshot shows the 'Risk Reports Menu' in the Nimbus LMS. At the top, there are navigation links for 'Main Menu' and 'Site Admin Menu', and a 'Log out' link. The date 'Thurs 26 Jul 2012' is displayed. The 'learningnexus' logo is on the left, and the 'Nimbus LMS' logo with the name 'Tim Harding' is on the right. The main heading is 'Risk Reports Menu'. Below it, a instruction reads: 'Please select your desired choices from the options below; choose the date period for which you would like to view a report and finally, select the type of report that you would like to generate.' The menu is organized into four sections: 'User Options', 'Topic Options', 'Report Options', and 'Detail Options'. 'User Options' includes 'Show User ID' (checkbox), 'Sort by User Name' (radio), 'Sort by User ID' (radio), 'Show Active Users' (checkbox), and 'Show Retired Users' (checkbox). 'Topic Options' includes 'Show Topic Course ID' (checkbox), 'Sort by Topic Title' (radio), 'Sort by Topic Course ID' (radio), 'Show Active Topics' (checkbox), and 'Show Retired Topics' (checkbox). 'Report Options' includes 'Start Date' (Mar 2012) and 'End Date' (July 2012) dropdowns. 'Detail Options' includes 'Include if 'At Risk'' (checkbox), 'Include if 'Not at Risk'' (checkbox), and 'Include if 'Not Complete'' (checkbox). To the right of these sections are three expandable report options: '> Risk Report by Topic', '> Risk Report by User', and '> Risk Detail Summary'. A 'Back' link is at the bottom right.

Figure 7-1: Risk Reports Menu

The risk reports menu consists of four sets of report options: -

- User Options

These settings determine if the user ID is to be shown in the report and if the users are to be sorted by name or by ID. The default settings are that the user ID is not shown and the users are sorted by name.

- Topic Options

These settings determine if the course ID is to be shown in the report and if the courses are to be sorted by title or by ID. The default settings are that the course ID is not shown and the courses are sorted by title.

- Report Options

This setting determines the date period during which risk assessment data is to be reported on. The default setting is the entire period for which risk assessment data is available.

- Detail Options

A risk assessment report can include three possible categories of risk: -

- Show if 'At Risk' (default)
- Show if 'Not at Risk'
- Show if 'Not Complete'

The risk reports menu also contains the following menu items: -

- Risk Report by Topic

This menu item generates a report detailing the risk status of each of the selected users for each of the selected risk assessment topics.

- Risk Report by User

This menu item generates a report detailing the risk status of each of the selected risk assessment topics for each of the selected users.

- Risk Detail Summary

This menu item generates a report detailing the numbers of the selected users who fall into each of the selected risk detail option categories for each of the specific risk items of the selected risk assessment topics.

Selecting any of the menu items listed above accesses the risk report options menu. Figure 7-2 shows the risk report options menu: -

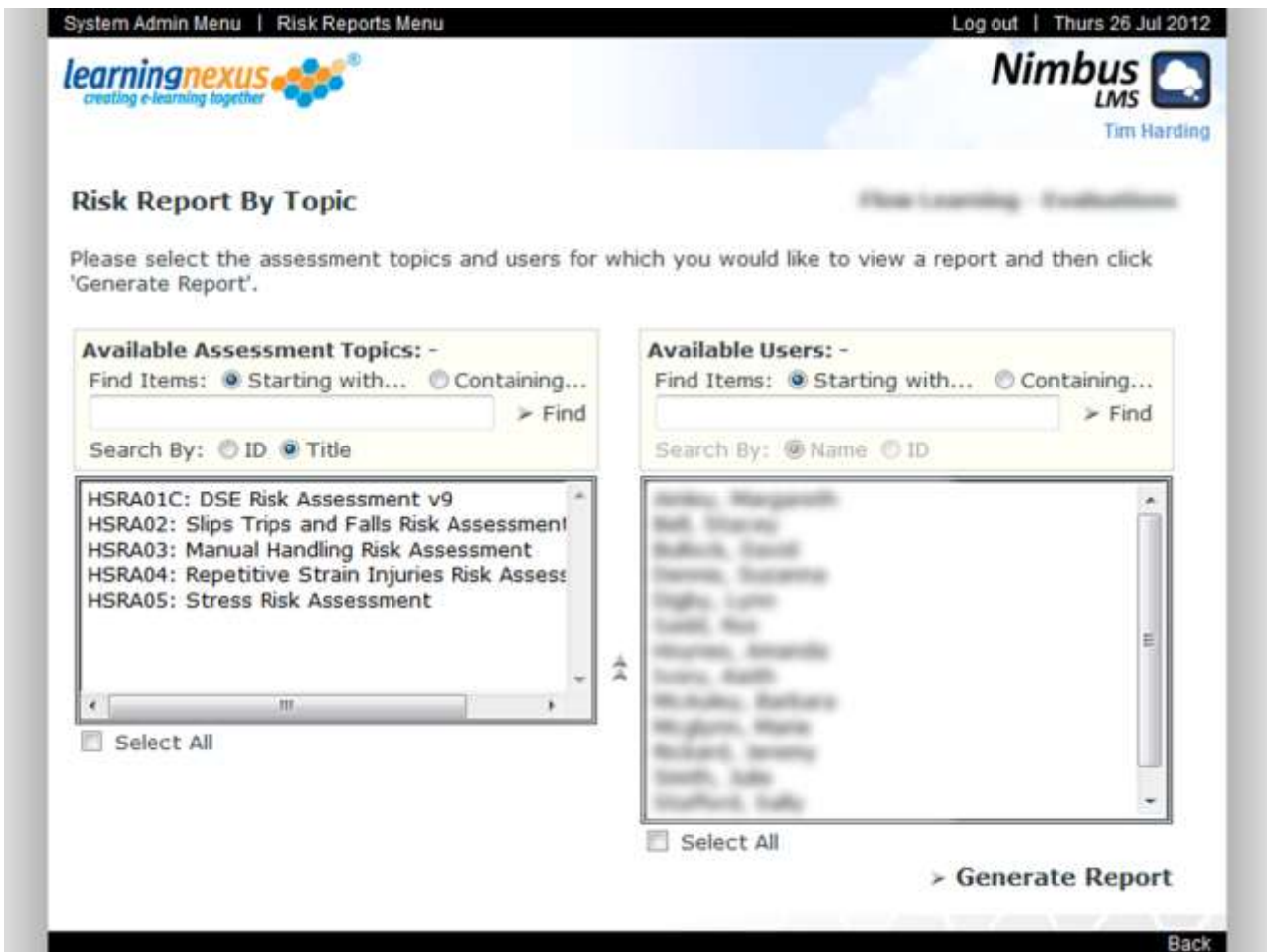


Figure 7-2: Risk Report Options Menu

The risk report options menu consists of two lists; each of which has an option to select all of the entries in the list. The 'Available Assessment Topics' list shows all of the risk assessment topics that are allocated to the site or group(s) for which the desired report is to be generated. The 'Available Users' list shows all of the users who are members of the site or group(s) for which the desired report is to be generated. Both lists are formatted and sorted using the options selected in the previous administration reports menu.

Items in the lists can be located using the 'Find Items' boxes and can be selected by using the usual click, control-click and shift-click keyboard / mouse combinations. If the current user has previously selected a set of assessment topics and users in order to generate a report and they have not since exited the risk reports section then an option to restore the previous selection is also displayed under each list. When the assessment topics and users to be included in the report have been selected, the report is generated by clicking on the 'Generate Report' option.

Risk Report by Topic

Figure 7-3 shows an example of a risk report by topic: -

[Close](#) | [Print](#) | [Save](#) | [E-mail](#) | [Export](#)

Administration Reports

Risk Report By Topic

Report Generated By: Tim Harding at 11:05:22 on 26 July 2012
 Report Options: Show Topic Course ID; Sort By Topic Course ID; Sort By User Name; Show if 'At Risk'; Show if 'Not at Risk'; Show if 'Not Complete'; Start Date: Oct 2011; End Date: July 2012.

Connect Working Association Ltd

1.) HSRA03: Manual Handling Risk Assessment

Notes	User Name	Status	First Used	Last Used	Tools
<input type="checkbox"/>	J. Hall, Richard B.	At Risk	01/03/2012	01/03/2012	
<input type="checkbox"/>	J. Hall, Richard B.	At Risk	01/03/2012	01/03/2012	
<input type="checkbox"/>	J. Hall, Richard B.	Not Used	-	-	

The following Risk Assessment topics have not been used by any of the selected users during the specified date period: -

1.) HSRA01C: DSE Risk Assessment v9

Notes	Assessment Topic	Status	First Used	Last Used	Tools
<input type="checkbox"/>	J. Hall, Richard B.	Not Used	-	-	
<input type="checkbox"/>	J. Hall, Richard B.	Not Used	-	-	
<input type="checkbox"/>	J. Hall, Richard B.	Not Used	-	-	

2.) HSRA02: Slips Trips and Falls Risk Assessment



Notes	Assessment Topic	Status	First Used	Last Used	Tools
<input type="checkbox"/>	J. Hall, Richard B.	Not Used	-	-	
<input type="checkbox"/>	J. Hall, Richard B.	Not Used	-	-	
<input type="checkbox"/>	J. Hall, Richard B.	Not Used	-	-	

Figure 7-3: Sample Risk Report by Topic

If the Include if 'Not Complete' detail option is selected then the risk report by topic is split into two sections. The first section contains the risk assessment topics for which at least one of the selected users has a risk status. The second section contains the risk assessment topics which have not been used by any of the selected users.

The section of the report pertaining to each of the selected risk assessment topics contains a single entry for each of the selected users who have accessed the risk assessment during the reporting period.

The following information is displayed for each of the users: -

- A 'Notes' tick box. Ticking this box displays any notes that have been saved against the specific risk record within the selected date period.
- The user's name.
- The risk status of the user for the risk assessment topic. Possible status values are: -
 - At Risk
A risk has been identified for at least one of the risk items covered by the risk assessment topic.
 - Not at Risk
No risks have been identified for the risk assessment topic.
 - Incomplete
The user has accessed the risk assessment topic but has not yet completed it.
 - Not Used
The user has not accessed the risk assessment topic within the reporting period.
- The earliest date within the reporting period on which the user accessed the risk assessment topic.
- The latest date within the reporting period on which the user accessed the risk assessment topic.
- Two 'Tools' icons. These tool icons have the following functions: -
 -  - This icon displays a report showing the details of the risk status of the user for the risk assessment topic. Please see the Detailed Report section on page 18 of this document for more information on this report.
 -  - This icon displays a 'Risk Assessment Notes Report' which allows the notes stored against the specific risk record to be managed. Please see the Risk Assessment Notes Report section on page 79 of this document for more information on this report.

Risk Report by User

Figure 7-4 shows an example of a risk report by user: -

[Close](#) | [Print](#) | [Save](#) | [E-mail](#) | [Export](#)

Administration Reports

Risk Report By User

Report Generated By: Tim Harding at 11:07:48 on 26 July 2012
 Report Options: Show Topic Course ID; Sort By Topic Course ID; Sort By User Name; Show if 'At Risk'; Show if 'Not at Risk'; Show if 'Not Complete'; Start Date: Oct 2011; End Date: July 2012.

Contact Working Association Ltd

1.) *[Name Redacted]*

Notes	Assessment Topic	Status	First Used	Last Used	Tools
<input type="checkbox"/>	1. HSRA03: Manual Handling Risk Assessment	At Risk	01/03/2012	01/03/2012	
<input type="checkbox"/>	2. HSRA01C: DSE Risk Assessment v9	Not Used	-	-	
<input type="checkbox"/>	3. HSRA02: Slips Trips and Falls Risk Assessment	Not Used	-	-	

2.) *[Name Redacted]*

Notes	Assessment Topic	Status	First Used	Last Used	Tools
<input type="checkbox"/>	1. HSRA03: Manual Handling Risk Assessment	At Risk	01/03/2012	01/03/2012	
<input type="checkbox"/>	2. HSRA01C: DSE Risk Assessment v9	Not Used	-	-	
<input type="checkbox"/>	3. HSRA02: Slips Trips and Falls Risk Assessment	Not Used	-	-	

The following users have not used any of the selected Risk Assessment topics during the specified date period: -

1.) *[Name Redacted]*



Notes	Assessment Topic	Status	First Used	Last Used	Tools
<input type="checkbox"/>	1. HSRA01C: DSE Risk Assessment v9	Not Used	-	-	
<input type="checkbox"/>	2. HSRA02: Slips Trips and Falls Risk Assessment	Not Used	-	-	
<input type="checkbox"/>	3. HSRA03: Manual Handling Risk Assessment	Not Used	-	-	

Figure 7-4: Sample Risk Report by User

If the Include if 'Not Complete' detail option is selected then the risk report by user is split into two sections. The first section contains the users for which at least one of the selected risk assessment topics users has a risk status. The second section contains the users which have not used any of the selected risk assessment topics.

The section of the report pertaining to each of the selected users contains a single entry for each of the selected risk assessment topics which have been accessed by the user during the reporting period.

The following information is displayed for each of the topics: -

- A 'Notes' tick box. Ticking this box displays any notes that have been saved against the specific risk record within the selected date period. This box cannot be ticked if there are no such notes currently stored.
- The title of the risk assessment topic.
- The risk status of the risk assessment topic for the user. Possible status values are: -
 - At Risk
A risk has been identified for at least one of the risk items covered by the risk assessment topic.
 - Not at Risk
No risks have been identified for the risk assessment topic.
 - Incomplete
The user has accessed the risk assessment topic but has not yet completed it.
 - Not Used
The user has not accessed the risk assessment topic within the reporting period.
- The earliest date within the reporting period on which the user accessed the risk assessment topic.
- The latest date within the reporting period on which the user accessed the risk assessment topic.
- Two 'Tools' icons. These tool icons have the following functions: -
 -  - This icon displays a report showing the details of the risk status of the user for the risk assessment topic. Please see the Detailed Report section on page 18 of this document for more information on this report.
 -  - This icon displays a 'Risk Assessment Notes Report' which allows the notes stored against the specific risk record to be managed. Please see the Risk Assessment Notes Report section on page 79 of this document for more information on this report.

Risk Detail Summary

Figure 7-5 shows an example of a risk detail summary report: -

Close Print Save E-mail Export			
Administration Reports			
Risk Detail Summary			
Report Generated By: Tim Harding at 11:09:21 on 26 July 2012			
Report Options: Show Topic Course ID; Sort By Topic Course ID; Show if 'At Risk'; Show if 'Not at Risk'; Show if 'Not Complete'; Start Date: Oct 2011; End Date: July 2012.			
1.) HSRA03: Manual Handling Risk Assessment			
Risk Assessment	At Risk	Not At Risk	Not Completed
Load Position	1	1	153
Body Movement	2	0	153
Load Movement	0	2	153
Workrate	0	2	153
Load Size	2	0	153
Ease of Handling	2	0	153
Physical Characteristics	1	1	153
Manual Handling	0	2	153
Floor Conditions	2	0	153
Lighting	0	2	153
Clothing	0	2	153
Physical Requirements	0	2	153
Training	1	1	153
Personal Physical Condition	1	1	153
Risk Total:	12		

Figure 7-5: Sample Risk Detail Summary Report

The section of the report pertaining to each of the selected risk assessment topics contains a single entry for each of the risk items covered by the risk assessment topic.

The following information is displayed for each of the topics: -

- The title of the specific risk item.
- The number of the selected users for which the risk status specified in the report detail options has been identified during the reporting period.

If the Include if 'At Risk' detail option has been selected then the total number of specific risks identified during the reporting period is also displayed for the risk assessment topic.

Risk Assessment Notes Report





A risk assessment notes report is accessed using the tool icon next to a specific risk record in either a Risk Report by Topic or a Risk Report by User. Figure 7-6 shows an example of a risk assessment notes report: -

Close | Print | Save | E-mail | Export

Administration Reports Risk Assessment Notes Report

Report Generated By: Tim Harding at 11:13:00 on 26 July 2012
Report Options: Start Date: Mar 2012; End Date: July 2012.

User: Harding, Tim
Topic: DSE Risk Assessment v9

Note Text	Note Author	Date Modified	Tools
1. Keyboard installed - risk resolved.	Harding, Tim	26/07/2012	 
2. Requested a new keyboard from IT.	Harding, Tim	26/07/2012	 

> Add a Note

Figure 7-6: Sample Risk Assessment Notes Report

This report shows all of the notes that have been stored for the selected user and risk assessment topic during the selected reporting period and is sorted in descending order by the note date.

The following information is displayed for each of the notes: -



- The text of the note.
- The author of the note.
- The date on which the note was added or last modified.
- Two 'Tools' icons. These tool icons have the following functions: -
 -  - This icon displays the modify note dialog which allows the text of the selected note to be modified.
 -  - This icon deletes the selected note.
- An 'Add Note' menu item which displays the add note dialog enabling a new note to be added.

Figure 7-7 shows the 'add / modify' note dialog: -



Figure 7-7: Add / Modify note dialog

The 'add / modify note' dialog consists of an area in which to modify or add the note text and confirm and cancel menu items. The length of the note text is limited to 255 characters (including white space). When the desired note text has been entered, the note is saved by clicking on the 'Confirm' menu item. The 'Note Author' and 'Date Modified' entries for the note will automatically be set to the current user and date.

This page intentionally left blank