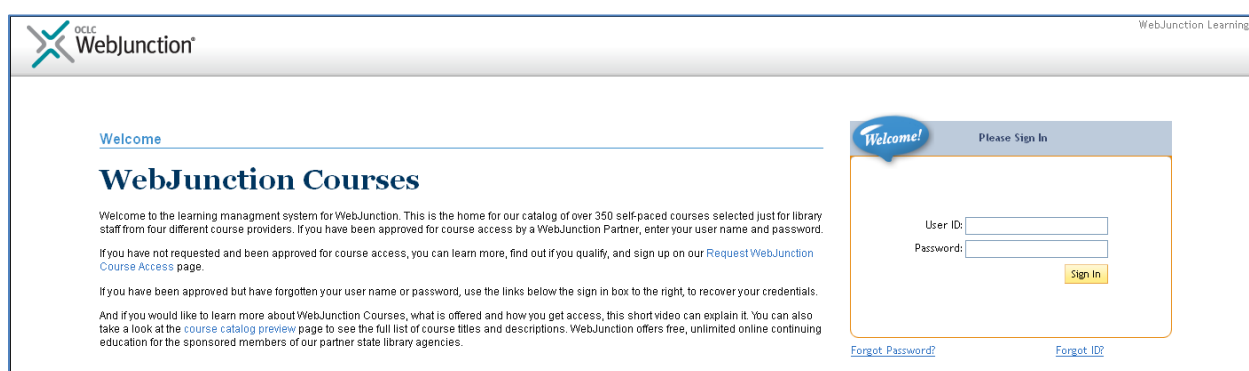


Viewing and Reporting on Member Learning Activity

Everything to do with courses at WebJunction happens in a learning management system (LMS), which is a separate site from Webjunction.org. As a partner admin, you approve sponsored learning account creation and access to courses for that system. Members will sign in, browse the catalog, select and launch courses, and print certificates there.

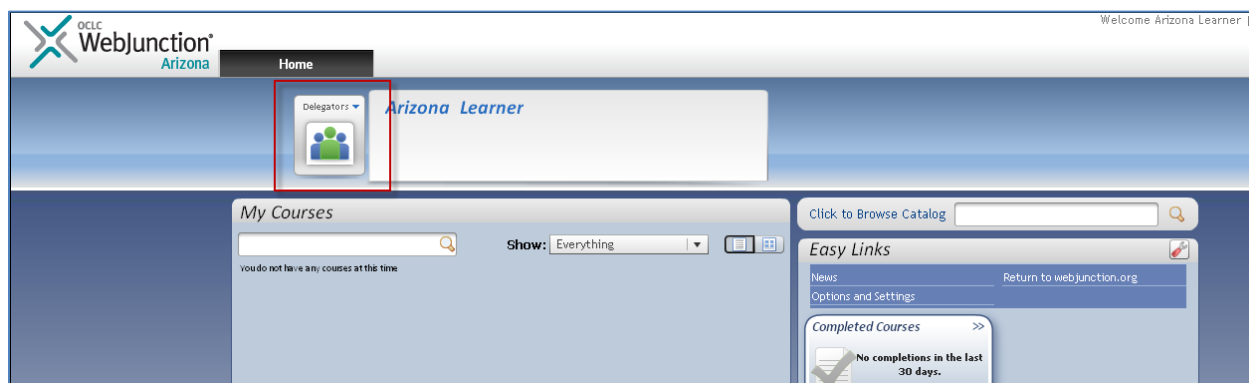
You will also sign into the LMS in order to track what the learners in your state are doing. You will have a user account in the LMS but with the added privileges of **Supervisor**. These privileges give you access to view and report on your members' learning activity.

The login page for the LMS is here: <https://oclc.plateau.com/plateau/user/login.jsp>

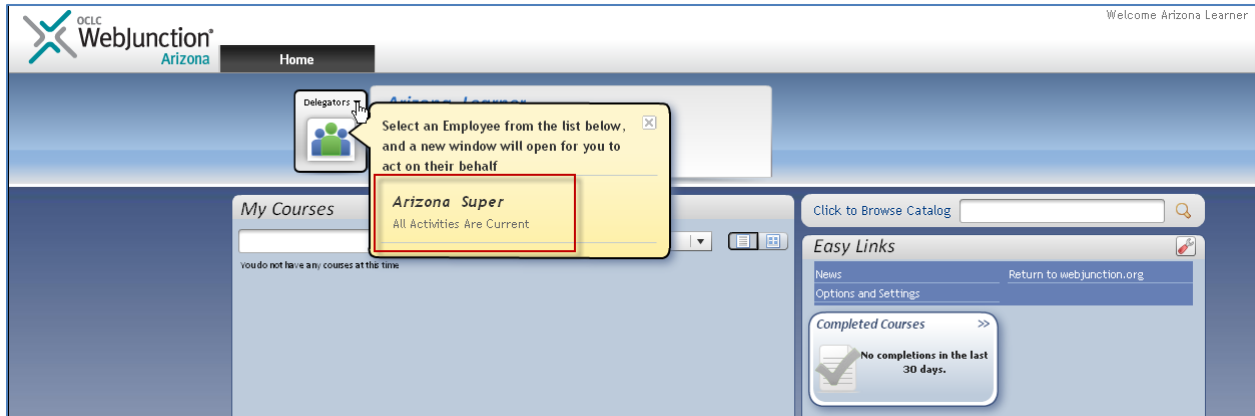


Sign in with your username and password. If this is your first login, you will receive an email with account information and instructions.

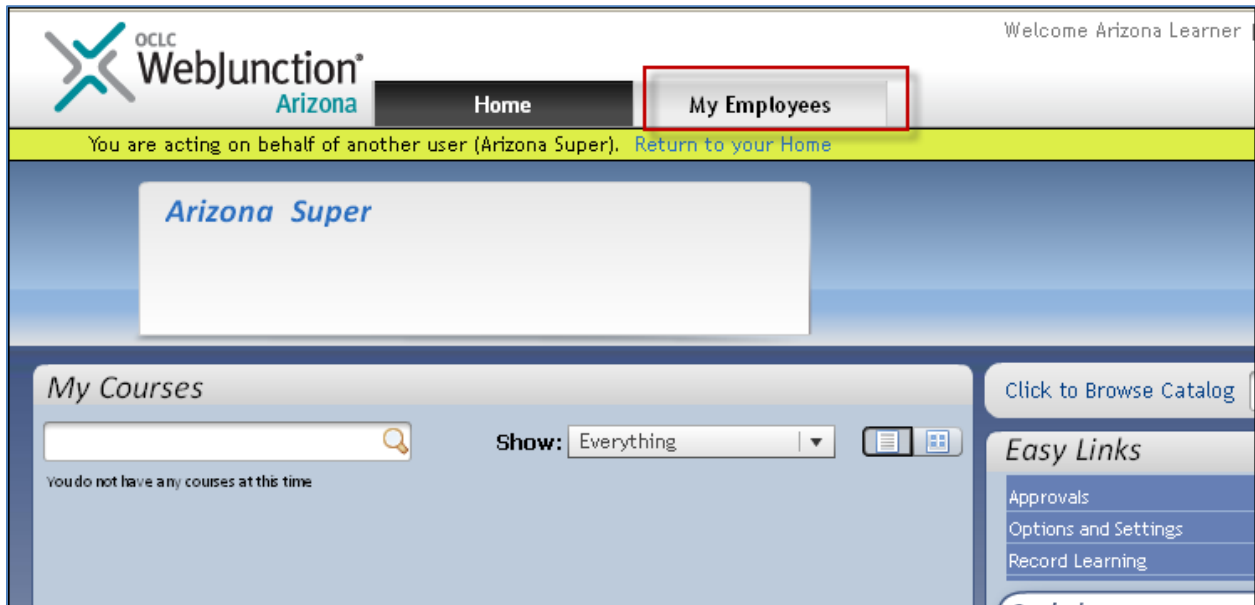
Your personalized page in the LMS will look like every other user's in your state, except for one difference: You will see the **Delegators** button by your name.



When you click or hover over this button, you will see the Supervisor account that is delegating its privileges to you.



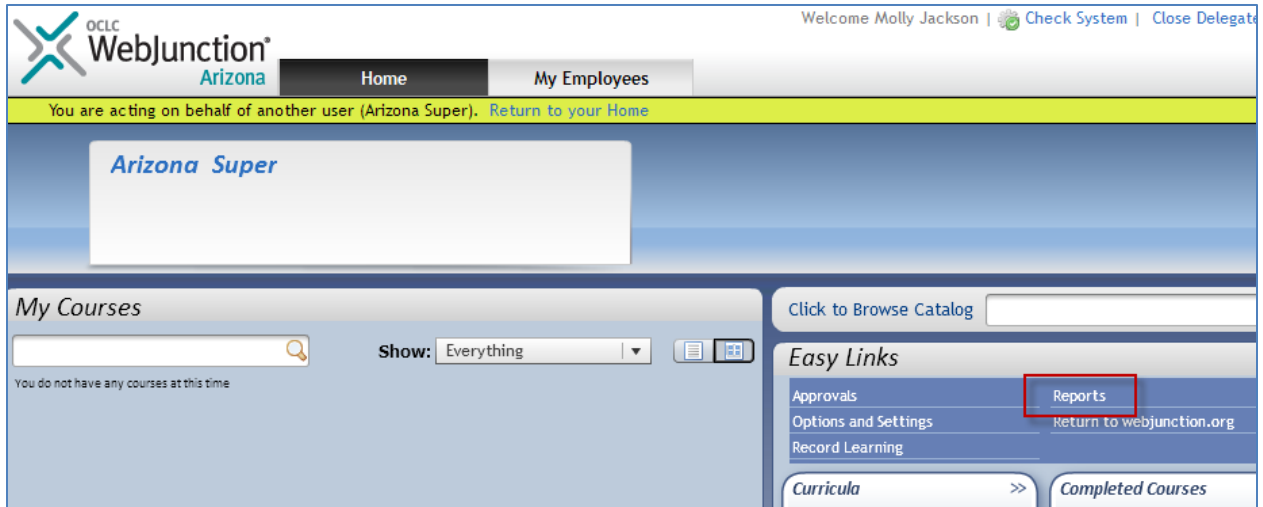
Clicking on that account's name will take you into impersonation mode in a separate window: You will be acting as the supervisor of all the learners in your state. In that window, you will see a green notice bar, and a new tab – **My Employees** – in addition to the **Home** tab.



Running Reports on Your Members

Every month you will automatically receive a **Course Usage Report** on your members. It will be emailed to you from the LMS on the 2nd of each month. But you can also run your own course usage reports any time you like, using different date ranges or other parameters. And there are other reports you can run as well.

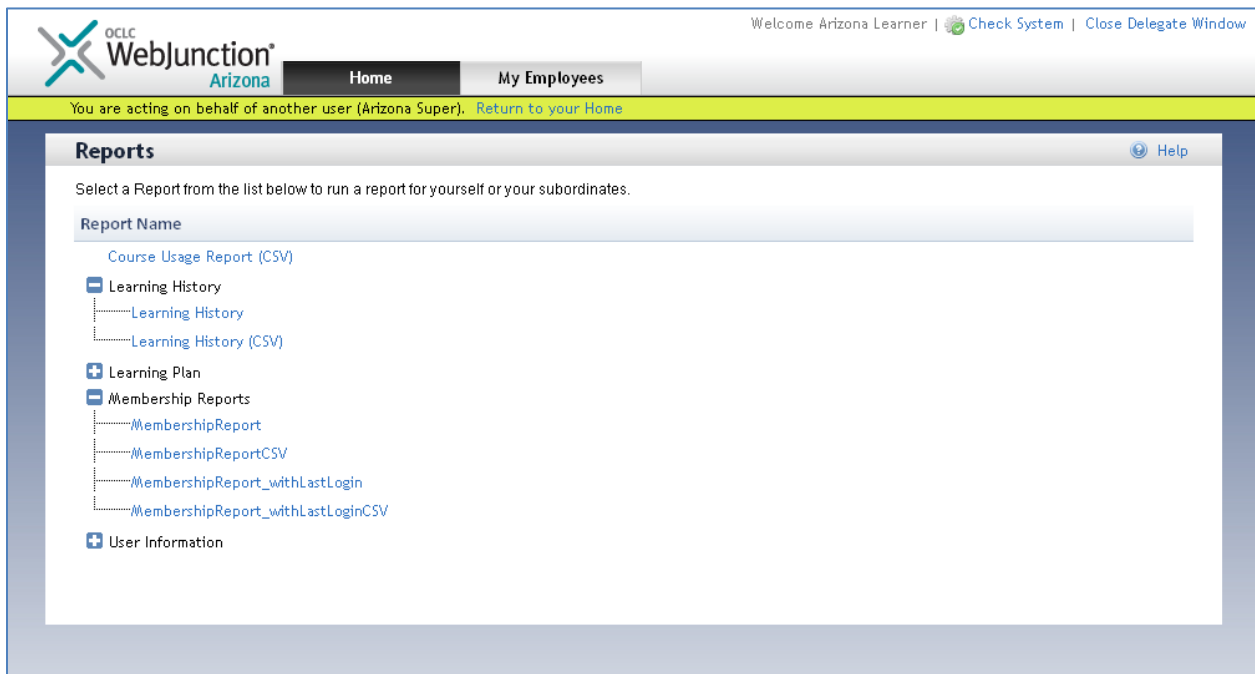
To run reports, you must be impersonating the Supervisor account. Click on the **Reports** link in the right column under **Easy Links**.



You will see a list of reports. Except for **Course Usage Report (CSV)**, they will initially be collapsed into groups, which you can expand by clicking on the plus icons. Your members will have access to the same reports described here, but their results will show only their own activity.

Most reports come in 2 types. The ones with CSV in the title will download as a comma separated values file that you can view in Excel or other spreadsheet applications. The ones without CSV allow you to download or view the report in either HTML or PDF formats.

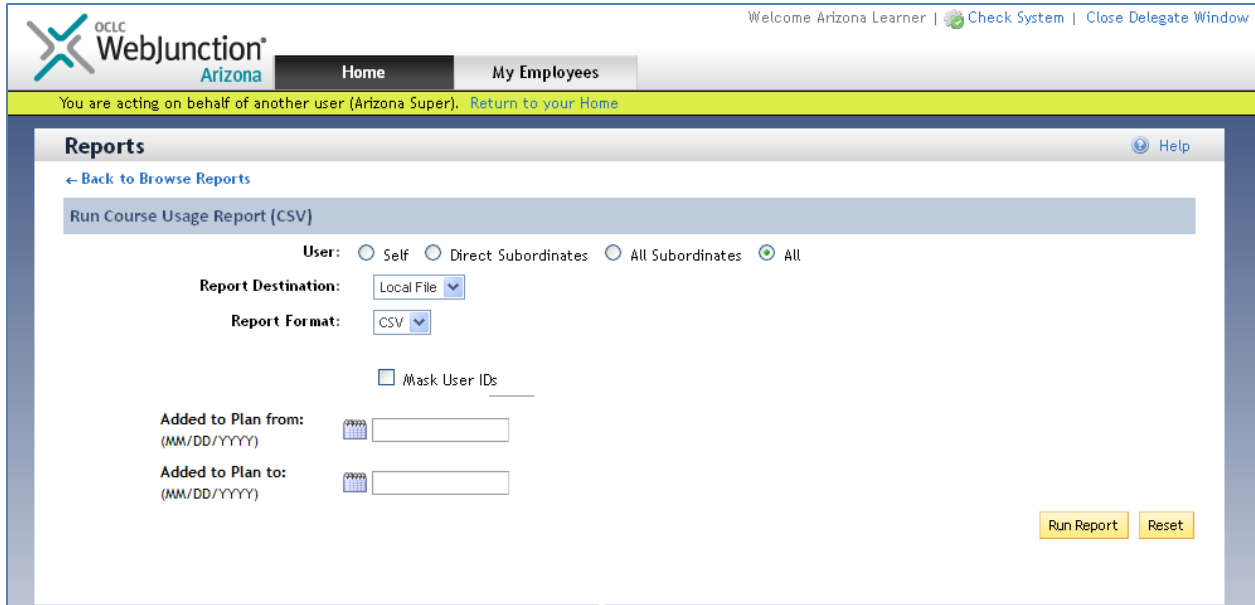
In general, we recommend the CSV versions of the reports, especially when the resulting list is long. CSV allows for much easier sorting, filtering and analysis of the records.



Course Usage Report (CSV)

The **Course Usage Report (CSV)** is the one you will receive automatically each month. It contains all course activity that has been recorded in the new system. Learning history migrated from the previous system will not appear in this report. Migrated users will appear once they add a course to their learning plans in the new system. You can run this report to see up-to-the-minute course usage activity, or select a specific date range.

1. Click on the **Course Usage Report (CSV)** link. You will see this screen:



The screenshot shows the OCLC WebJunction Arizona interface. At the top, there is a navigation bar with 'Home' and 'My Employees' tabs. Below the navigation bar, a yellow banner indicates the user is acting on behalf of another user (Arizona Super) and provides a 'Return to your Home' link. The main content area is titled 'Reports' and contains a 'Run Course Usage Report (CSV)' form. The form includes the following elements:

- User:** Radio buttons for 'Self', 'Direct Subordinates', 'All Subordinates', and 'All' (selected).
- Report Destination:** A dropdown menu set to 'Local File'.
- Report Format:** A dropdown menu set to 'CSV'.
- Mask User IDs:** An unchecked checkbox.
- Added to Plan from:** A date picker set to (MM/DD/YYYY).
- Added to Plan to:** A date picker set to (MM/DD/YYYY).
- Buttons:** 'Run Report' and 'Reset' buttons.

2. Select **All Subordinates** to report on all the learners in your state. .
3. Uncheck **Mask User IDs**.
4. Enter **From** and/or **To** dates if you wish restrict to only courses added from a certain date range.
5. Click **Run Report**. You can choose either to save the file or open the report.

For every course that a learner has added to their *My Courses* learning plan, this report shows basic information about the learner, the course and provider, and when the course was added to the learner's plan. If that course was launched, you will also see the first and last times it was launched, and how much time was spent in the course. If the learner completed the course, you will see the completion date.

Learning History Report

The **Learning History** report shows all course completions, including those migrated from the old system. This report will give you the most complete list of courses completed by your members. You can run it at any time, specifying any range of dates.

Select the format of the Learning History report that you want. You have a choice between **Learning History** (for either HTML or PDF) and **Learning History (CSV)**. We recommend the CSV version.

The screenshot shows the OCLC WebJunction Arizona interface. At the top, there is a navigation bar with 'Home' and 'My Employees' tabs. A yellow banner below the navigation bar states: 'You are acting on behalf of another user (Arizona Super). Return to your Home'. The main content area is titled 'Reports' and includes a 'Help' icon. Below the title, there is a link to 'Back to Browse Reports' and a section for 'Run Learning History (CSV)'. The form contains the following fields and options:

- User:** Radio buttons for 'Self', 'Direct Subordinates', 'All Subordinates' (selected), and 'All'.
- Report Destination:** A dropdown menu set to 'Local File'.
- Report Format:** A dropdown menu set to 'CSV'.
- Mask User IDs:** An unchecked checkbox.
- Completed Date From:** A date picker field with '(MM/DD/YYYY)' below it.
- Completed Date To:** A date picker field with '(MM/DD/YYYY)' below it.
- Report Type:** Radio buttons for 'Summary' (selected) and 'Detail'.
- Include:** Radio buttons for 'Item Events' (selected), 'External Events', and 'Both'.
- Print Comments:** Radio buttons for 'Yes' and 'No' (selected).

At the bottom right of the form, there are two buttons: 'Run Report' and 'Reset'.

1. Select **All Subordinates**
2. Uncheck **Mask User IDs**.
3. Enter **From** and/or **To** dates if you wish to restrict to courses completed in a specific date range.
4. The **Summary** report type will generally give you all the information you want: user ID, first and last name, course title and completion date. The Detail report type includes more data about the course listing.
5. Skip the **Include** and **Print Comments** options.
6. Click **Run Report**. You can choose either to save the file or open the report.

Membership Reports

Membership Reports come in two types:

- The full **Membership Report**, lists all learners – including those migrated from the old system – your organization has approved to take courses. It also includes all applicants you have denied access to in the new system
- The **Membership Report with Last Login** lists only those approved learners who have signed into the new LMS. For each learner it includes the date of their last login to the LMS.

As with the other reports, we recommend the CSV version.

The screenshot shows the OCLC WebJunction Arizona interface. At the top, there is a navigation bar with 'Home' and 'My Employees' tabs. Below the navigation bar, a yellow banner indicates the user is acting on behalf of another user (Arizona Super) and provides a 'Return to your Home' link. The main content area is titled 'Reports' and contains a 'Run MembershipReportCSV' form. The form includes the following options:

- User:** Radio buttons for 'Self', 'Direct Subordinates', 'All Subordinates' (selected), and 'All'.
- Report Destination:** A dropdown menu set to 'Local File'.
- Report Format:** A dropdown menu set to 'CSV'.
- Mask User IDs:** An unchecked checkbox.
- Include Custom Fields:** A checked checkbox.

At the bottom right of the form, there are two buttons: 'Run Report' and 'Reset'.

1. Select **All Subordinates** and uncheck **Mask User IDs**.
2. Check **Include Custom Fields** in order to see each member's Place of Work and Library Type, as well as the date their account was created and whether that membership was approved or denied.
3. Click **Run Report**. You can choose either to save the file or open the report.

Learning Plan and User Information Reports

These two standard LMS reports are available, but are mostly redundant to the customized **Course Usage** and **Membership** reports. They are available, but most partners will not need them.

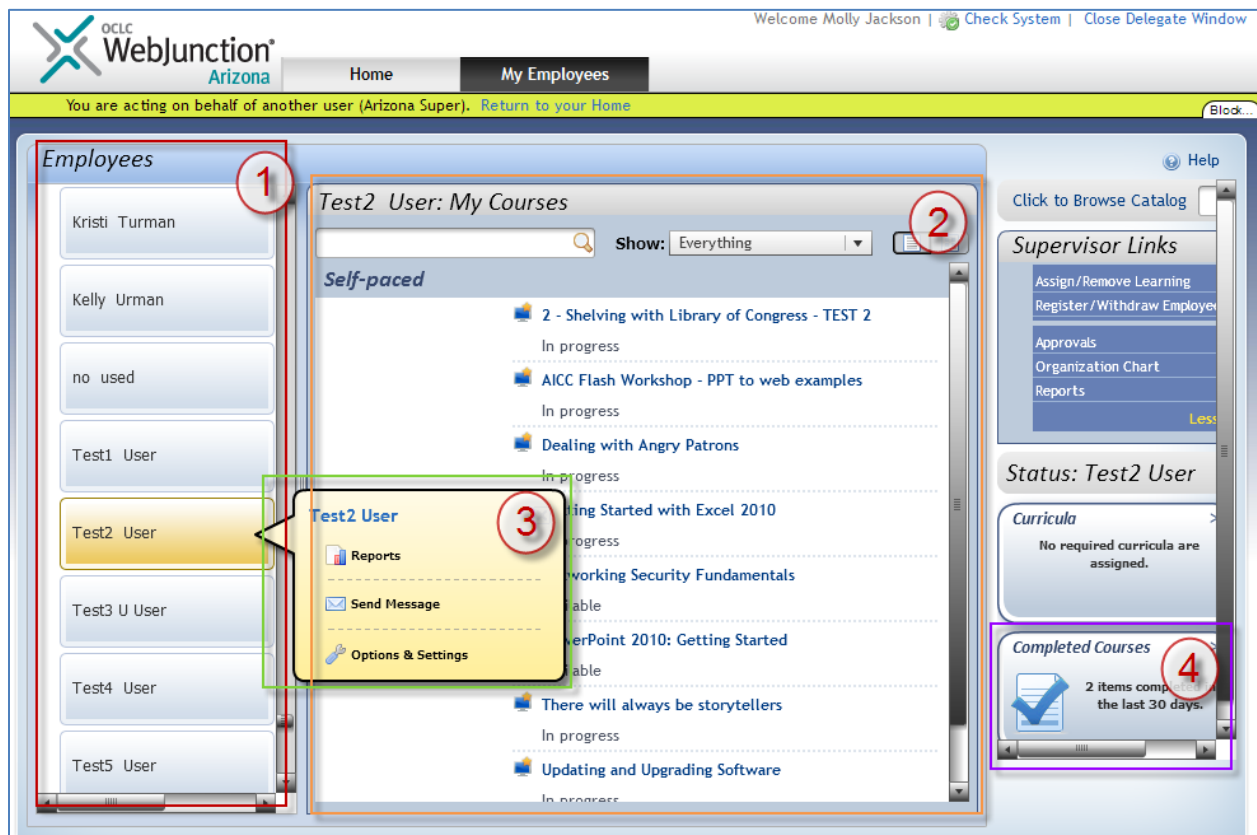
- **Learning Plan** is very similar to **Course Usage**, but omits Add to Plan and Launch dates, while including a little more course listing data.
- **User Information** includes many more user fields than the **Membership Report**, but almost all of these will be blank for your members.

My Employees Tab

The *Supervisor* account also has access to the **My Employees** screen. This screen allows you to view individual members' learning plans and history without needing to run a report.

Click on the **My Employees** tab at the top of the screen.

You will see a screen similar to your **Home** screen, but that displays activity of all the learners in your state instead of just your own.



1. **Employees list** – a list of all your approved members, sorted by last name. Scrolling is the only way to navigate through it. Click on a user name to select a member.
2. **My Courses** – the learning plan of the member selected on the left. You can see courses and the current status – either “Available” (not yet launched), or “In Progress” (launched but not completed).
3. Hovering over a user in the list brings up additional options. You can run reports on just this user. And you can email the user. Note that **Send Message** will just launch an email in your own email application, as with any normal web site email link.
4. **Completed Courses** – when a user is selected, this will take you to their completed courses list, and will allow you to print completion certificates for the member.

My Employees Additional Functions

Be aware that with the *Supervisor* role comes the ability to add and remove courses from your members’ learning plans. This kind of learning management is not something we anticipate most partners using. If you wish to use these features, please contact your Partner Services Consultant to discuss the workflow and possible concerns of using these features.