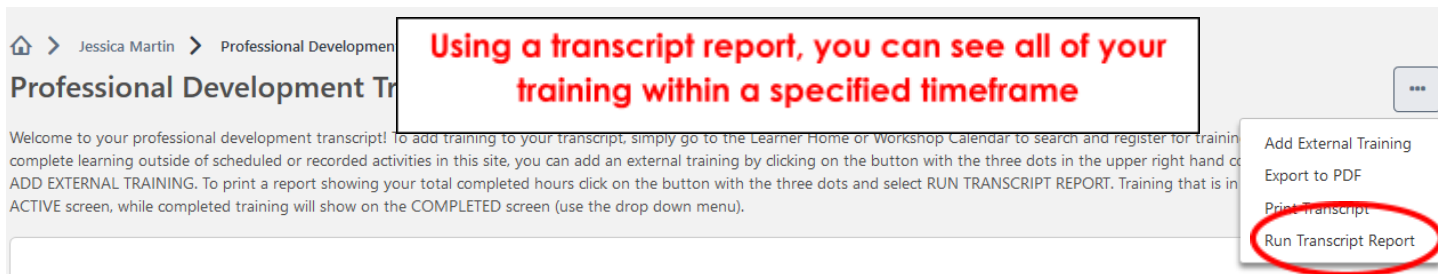


## Instructions to Run a Transcript/Flex Report:

To run a transcript report, navigate to your transcript and click on the *three-dot button on the upper right of the page*. Then select *Run Transcript Report*.



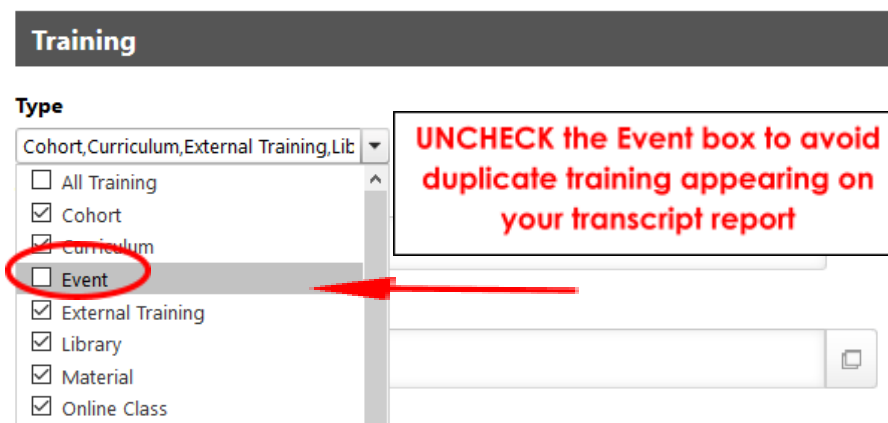
Using a transcript report, you can see all of your training within a specified timeframe

Welcome to your professional development transcript! To add training to your transcript, simply go to the Learner Home or Workshop Calendar to search and register for training complete learning outside of scheduled or recorded activities in this site, you can add an external training by clicking on the button with the three dots in the upper right hand of ADD EXTERNAL TRAINING. To print a report showing your total completed hours click on the button with the three dots and select RUN TRANSCRIPT REPORT. Training that is in ACTIVE screen, while completed training will show on the COMPLETED screen (use the drop down menu).

- Add External Training
- Export to PDF
- Print Transcript
- Run Transcript Report

### Step 1: Exclude Events

Under **Type**, click on the drop-down arrow and *uncheck* the *Event* category only. This is because the workshops you attend will show up as both **Sessions** and **Events**, so you do not want them counted twice in your report.



**Training**

**Type**

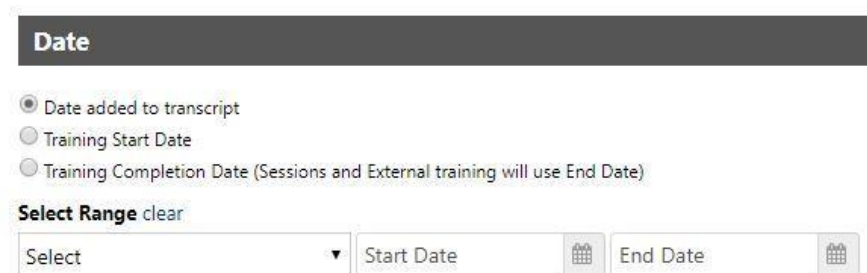
Cohort, Curriculum, External Training, Lib

- All Training
- Cohort
- Curriculum
- Event
- External Training
- Library
- Material
- Online Class

UNCHECK the Event box to avoid duplicate training appearing on your transcript report

### Step 2: Choose the Type of Report

Listed under the **Date** header, there are three types of **Transcript Reports** you can run (#3 is the most common).



**Date**

- Date added to transcript
- Training Start Date
- Training Completion Date (Sessions and External training will use End Date)

Select Range clear

Select Start Date End Date

#### 1. Date Added to Transcript

- You can choose to run a report showing all training that has been added to your transcript. This would include registered, in-progress *and* completed training.

## 2. Training Start Date

- This report will only show items with a start date that falls within the selected date range.

## 3. Training Completion Date (Most Commonly Used) → this is what you'll want to obtain a flex obligation report!

- The training completed report will only show *completed* hours within the dates you specify (an academic term or year, for example). **For a flex obligation report, FT faculty will want to use July 1 - June 30th of the current fiscal year. PT faculty will want to use start/end dates of the current semester.**

### Step 3: Include All Completions

If you are running report #3 (**Training Completion Date**), the **Include Completed Training Only** box will automatically become checked. To make sure you capture all completions, check the **Show all completions if the user has completed more than one instance** box (if you completed the same training more than once and want your report to reflect that information).

Advanced

- Include Associated Training (Curriculum Training and Pre or Post Work)
- Include Archived Training
- Include Completed Training Only
  - Show most recent completion
  - Show all completions if the user has completed more than one instance
- Include Training Detail Information

### Step 4: Include Training Hours

If you want to see your total hours completed, under **Advanced**, check the **Include Training Detail Information** box and then the **Training Hours** box.

Advanced

- Include Associated Training (Curriculum Training and Pre or Post Work)
- Include Archived Training
- Include Completed Training Only
  - Show most recent completion
  - Show all completions if the user has completed more than one instance
- Include Training Detail Information
  - Credits
  - Price
  - TITLE 5 Category
  - Training Purpose
  - How does this training lead to student, instructional, or staff improvement?
  - Provider
  - Training Hours
  - Version

### Step 5: Run Report

Review all of your selections for accuracy. To finalize, click **Run Report** and the system will generate an Excel document listing all of your completed activities and total hours for the date range you selected. **Note for**

**faculty: Instead of filling out the old flex obligation forms, you may now use these easy reports to submit your flex hours to the appropriate office!**

### Advanced

Include Associated Training (Curriculum Training and Pre or Post Work)

Include Archived Training

Include Completed Training Only

Show most recent completion

Show all completions if the user has completed more than one instance

Include Training Detail Information

Credits

Price

TITLE 5 Category

Training Purpose

How does this training lead to student, instructional, or staff improvement?

Provider

Training Hours

Version

Back

Run Report