Manager Analytics Overview:
How to Create Custom Reports

Bridge@UofI
Employee Development & Learning

If you been assigned the Manager role in Bridge@UofI, you can view employee learning transcripts, assign training, and run standard reports. Please see below for more information about analytics.

Within the Analytics area there is a plethora of data that you can use to create a report! The following guide goes over both ways available to create a scheduled report.

Please note this guide reflects the roles and features available during the initial rollout of the system. We look forward to adding additional roles, features, and diverse learning opportunities over the following months.

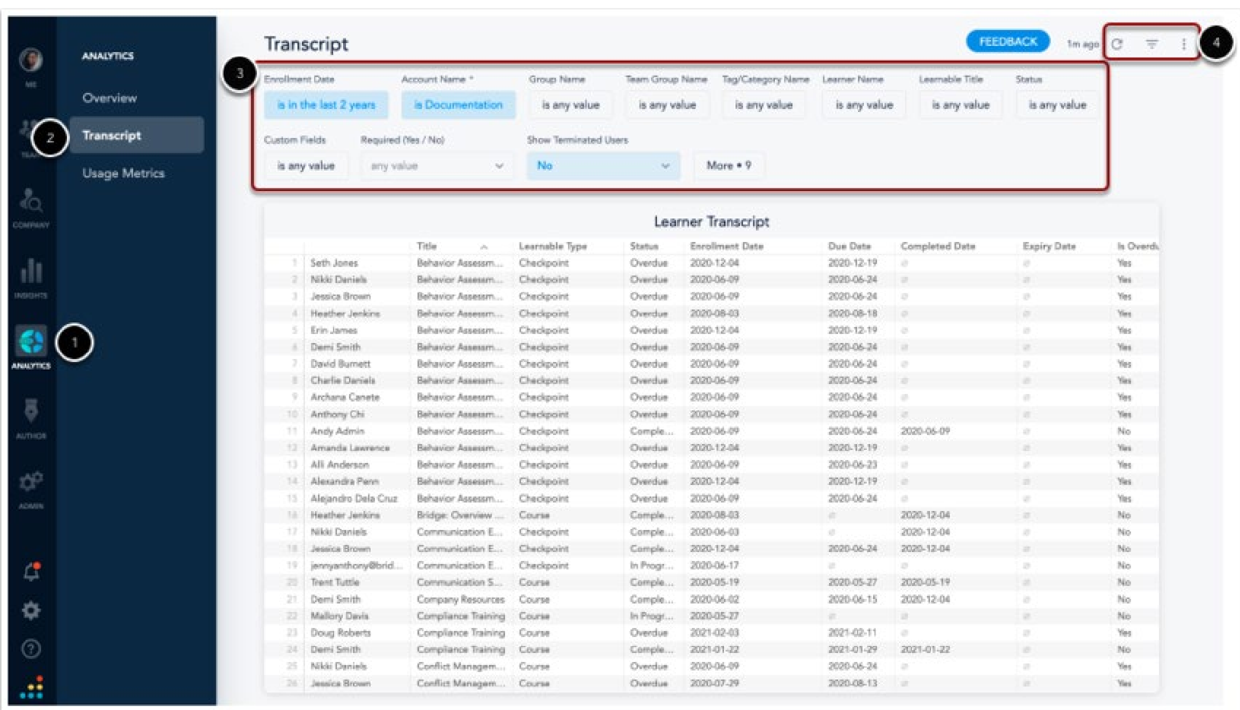
If you have system or training questions, please [submit a help ticket](#).

Analytics Report View

The Analytics Reports will give you a view of all enrollments data across all accounts set up within your instance of Bridge. These reports will let you pull a comprehensive list of information.

To get to the new Analytics reports you will want to select **Analytics** in the global navigation and then select the **Overview option.**

Filters in the Analytics Report



To access the Analytics report you will go to the **Analytics** [1] option in the navigation menu and select **Learners View** [2]. Here you have several **filter options** [3] and the options to **Search, Hide Filters, and Additional Options** [4].

Filter Options

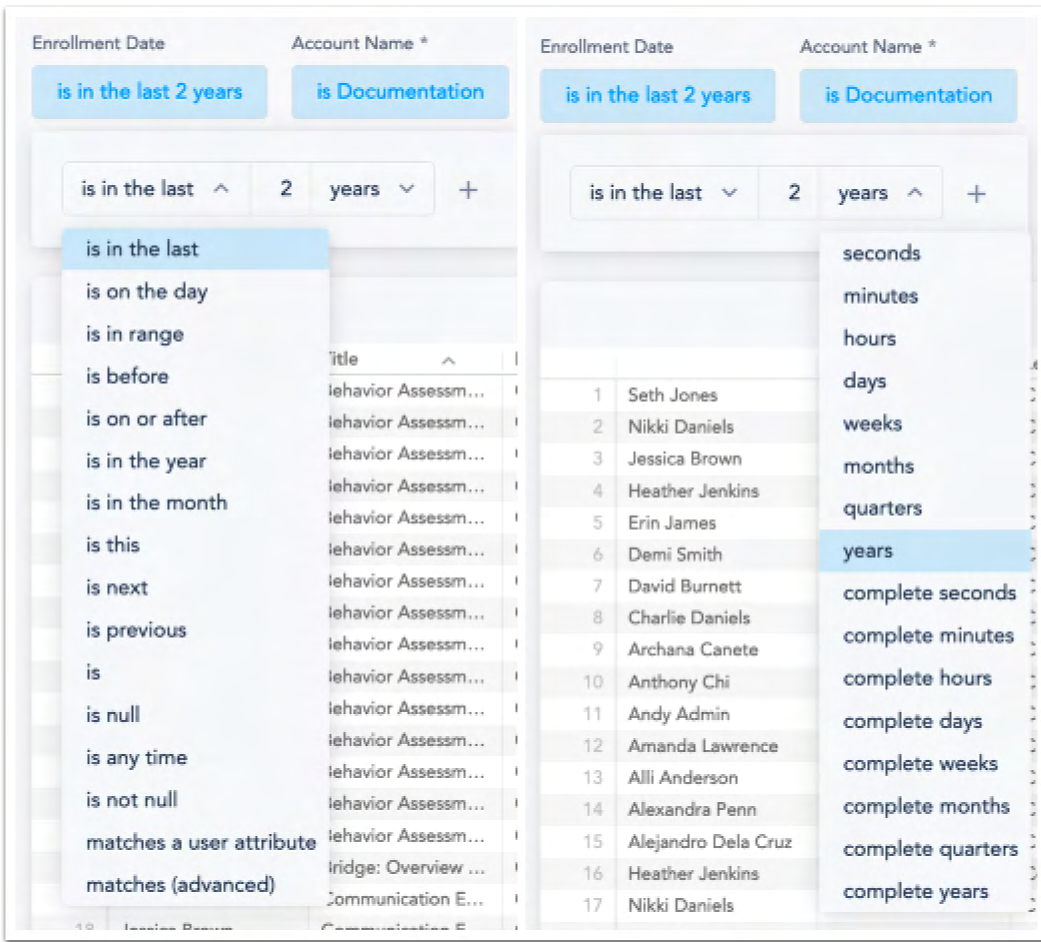
There are several filters you can choose from to pull data on your account; **Enrollment Date** [1], **Account Name** [2], **Group Name** [3], **Team Group Name** [4], **Tag/Category Name** [5], **Learner Name** [6], **Learnable Title** [7], **Status** [8], **Custom Fields** [9], **Required (Yes / No)** [10]**, Show Terminated Users** [11] and additional enrollments and learning item filter options [12].

The **Account Name** [2] will allow you to specify if you want to look for only the root accounts information or any of the subaccounts information.

The **Required (Yes / No)** [10] filter option will allow you to select if you want to look specifically for required or optional enrollments; leaving this filter as-is will search for both enrollment types.

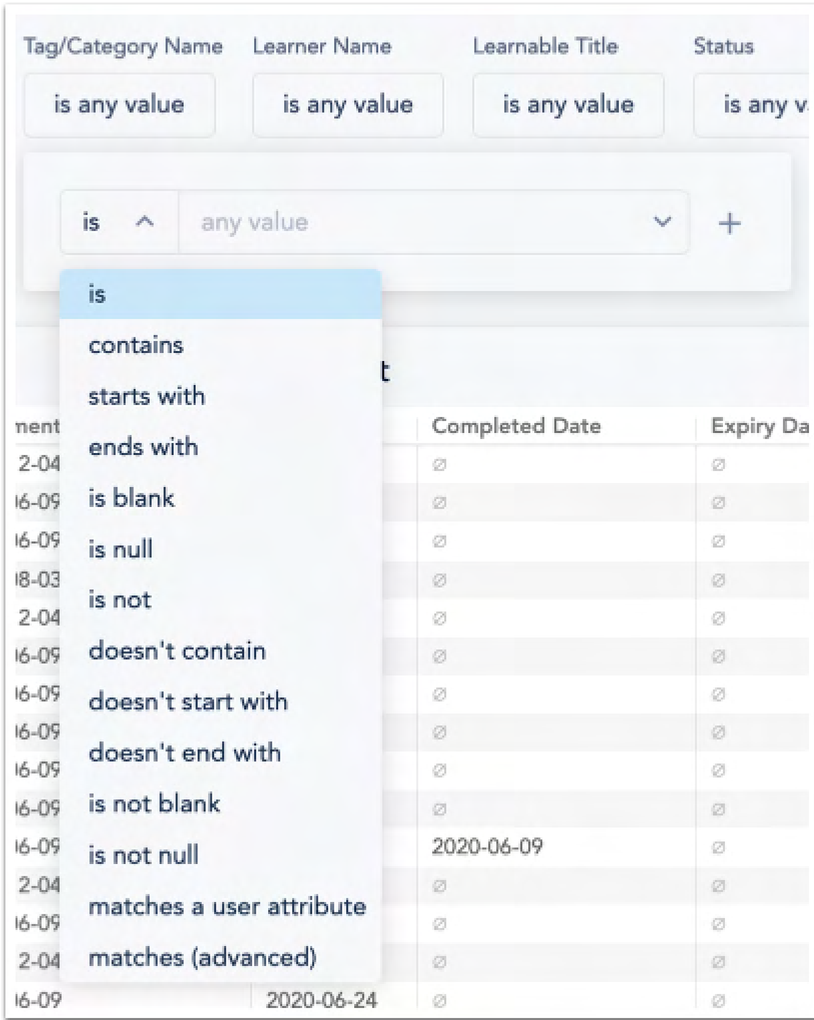
Show Terminated Users [11] will allow you to identify enrollments for all terminated users if needed.

Enrollment Date



The **Enrollment Date** filter can be set to various options, as seen in the screenshots above. You can choose from multiple options for this filter, such as 'is in the last' 'x' (this variable is one you manually type in) 'seconds', 'minutes', 'hours', 'days', 'weeks', etc.

Tag/Category Name and Learnable Titles Filter Options

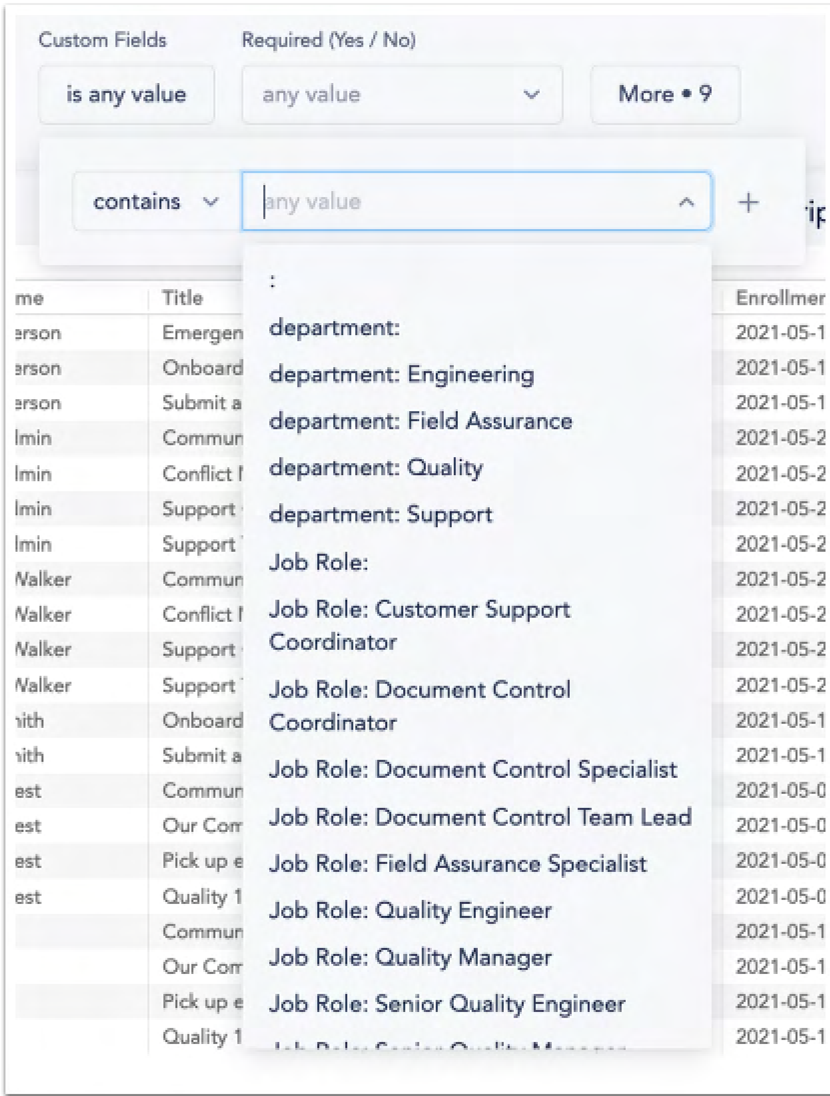


Tag/Category Name and Learnable titles all have the same options that allow you to specify if you want to look for a specific item.

- **is -** This will only pull data for the exact item(s) that you selected.
- **contains -** This will pull data if the enrollment contains any of the item(s) selected.
- **starts with -** This will pull data if the enrollment starts with the item(s) selected.
- **ends with -** This will pull data if the enrollments end with the item(s) selected.
- **is blank -** This will pull data if there is a group, tag/category, or learnable item(s) with no name (aka blank name or title).
- **is null -** This will pull data if there is any item(s) with no name.
- **is not -** This will pull data for any item that is not which item(s) you've selected.
- **doesn't contain -** This will pull data for any item that doesn't contain the item(s) you've selected.
- **doesn't start with -** This will pull data for any item that doesn't start with the item(s) you've selected.
- **doesn't end with -** This will pull data for any item that doesn't end with the item(s) you've selected.

- **is not blank -** This will pull data for any item(s) that is not blank.
- **is not null -** This will pull data for any item(s) that is not null.
- **matches a user attribute -** This will pull data for any item(s) that matches the user attribute(s) you've selected.
- **matches (advanced) -** This requires that you type the name exactly and will search as an 'is' statement.

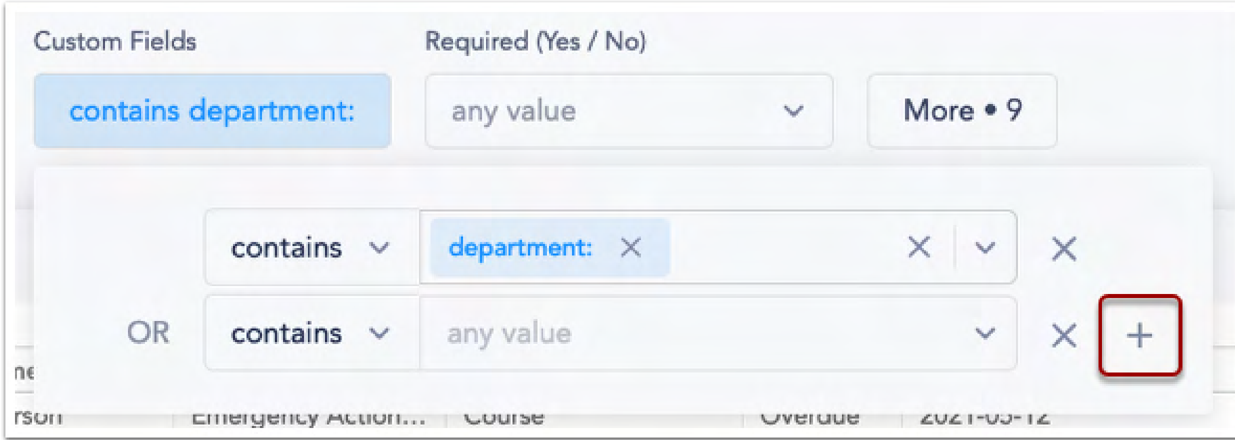
Custom Attributes



Custom fields filtering dynamically expands the Analytics Transcript table when viewing, downloading, or scheduling the table itself. Here are the steps to ensure that the filtered custom field types are getting into your Transcript table.

1. Select the 'contains' prefix from the Custom Fields advanced filter

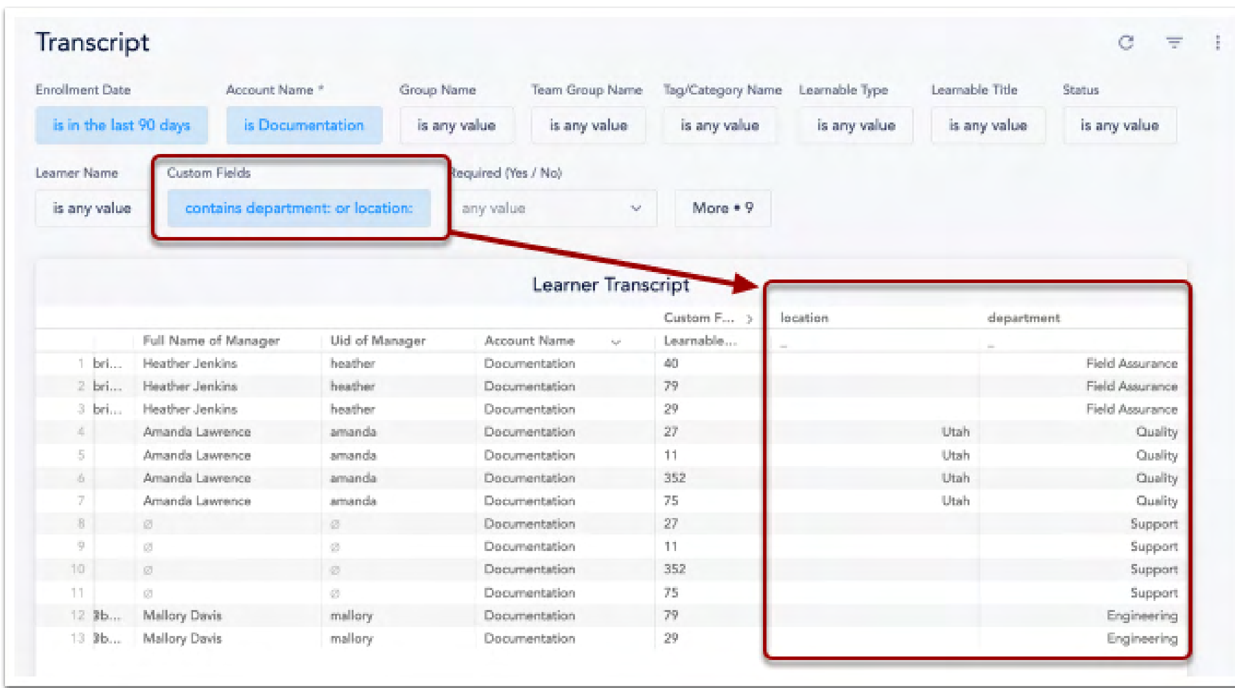
2. Type the custom field type name (without any value after it) into the Custom Fields filter input field, then hit tab



3. See that the custom field type will stick in the Custom Field filter input field

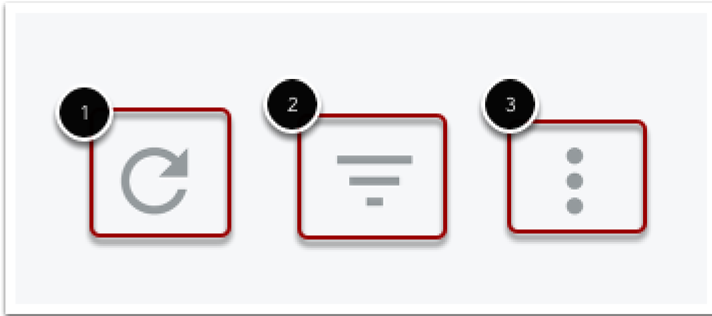
4. You can add another row (and with that another custom field type) by using the ‘+’ button at the right-hand side of the first row

5. Hit refresh at the top right corner of the page to actively filter based on your input criteria

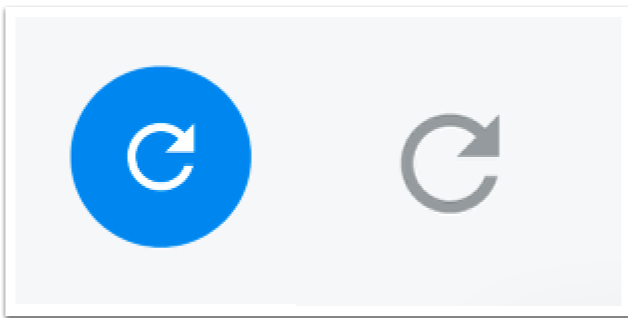


6. See that the data is not only filtered (if any specific criteria are defined), but the custom field type data is added to the far right of the Transcript table. You can drag and drop the columns in whatever order you would like.

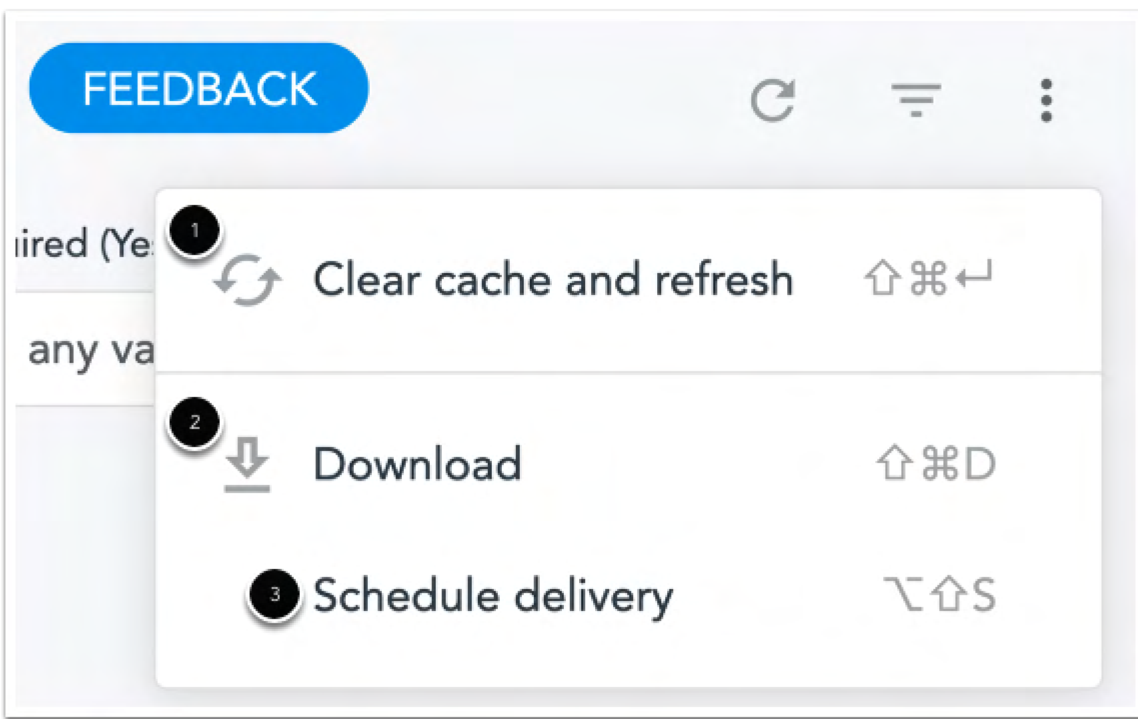
Remaining Options



In the top right corner of the Analytics are you will have the option to **Update** [1], **Hide/Show Filters** [2], and **Dashboard Actions** [3]



Once you've set up some filters for the search parameters the **Search** arrow will show up as blue, this indicates there are new options selected that need to be searched for. If you've already hit the search button it will show in grey.

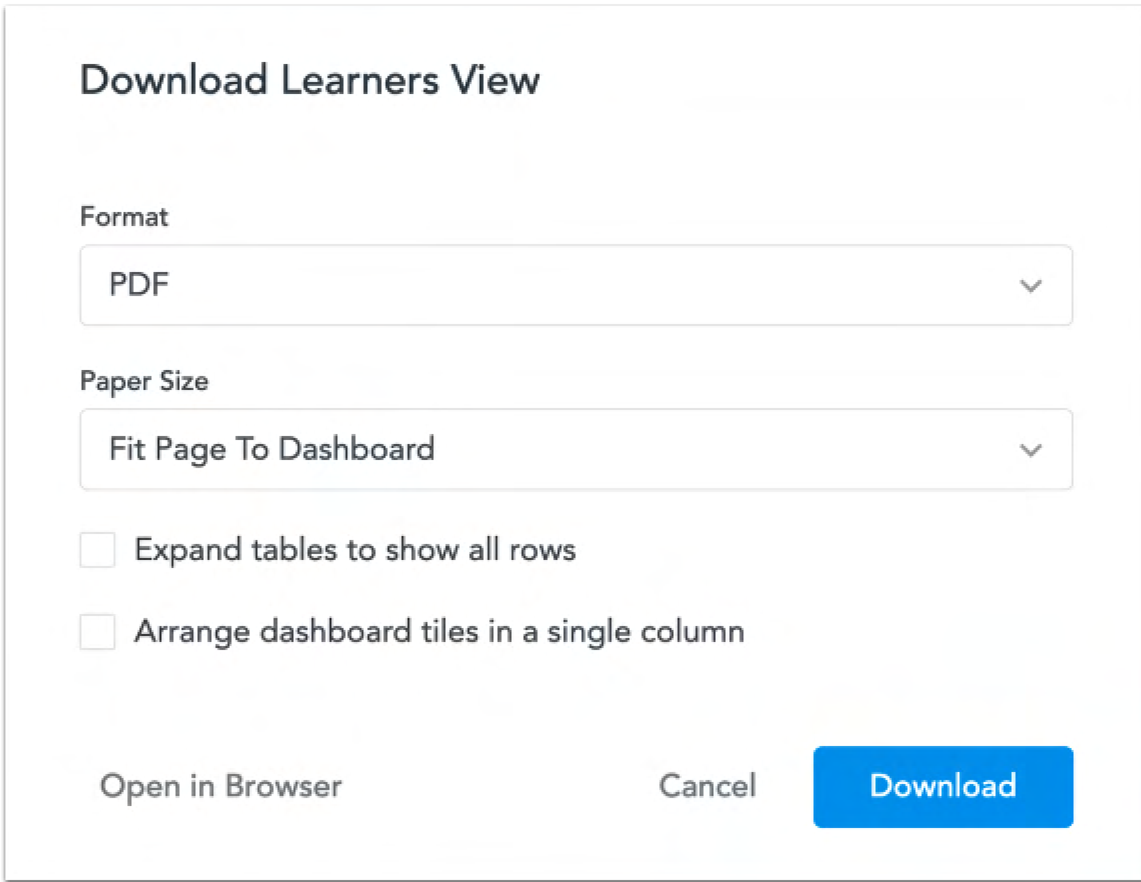


In the more options menu, you will see the options to **Clear Cache and Refresh** [1], **Download** [2], and **Schedule Delivery** [3].

Clear cache and refresh - The report will auto-refresh every hour, if wanting to see if new information has appeared since you initiated the search you can select this option. It will then show any new enrollment information that has come in.

Download - This allows you to download the information that appears for your search. This will show the widgets and information within the page as it shows on the webpage.

Download



Download allows you to download the information that appears for your search. This will let you choose if you want to download it in pdf or csv format, the paper size, expand tables to show all rows, and arrange the dashboard tiles in a single column. There is also an option open the report in the Browser to view the data.

Analytics Report Schedules

In analytics, you can download data as seen or set up a scheduled delivery.

To download the data as it shows click on the three dots in the top right-hand corner of the table and select **Download Data**.