GENERATING REPORTS WITHIN CHECKPOINT LEARNING USER GUIDE

TAX & ACCOUNTING

THOMSON REUTERS

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About Reporting

Checkpoint Learning enables Firm Administrators to generate reports about the firm’s employees, their licenses, online learning, and courses offered and taken. These reports found within Checkpoint Learning are exportable to excel. The **Export to Excel** button is typically found in the right hand side of each report. Each Checkpoint Learning module comes with reporting ability. This document reviews the different reporting options for each module within Checkpoint Learning.

In addition to these reports, Checkpoint Learning also offers the ability to extract data from the firm account and run customized reports on the firm’s data. In order to run customized reports, MS Access is required as the firm data is provided in a MS Access database.

Compliance Manager

The **Compliance Manager** page serves as the Firm Administrator's home page. It provides a report of selected staff's compliance status, including compliance deadline and number of credits needed to maintain compliance. The report filtering section on the left side panel enables filtering of the report by employee, regulator, deadline and more.

To view whether employees have met specific requirements within a regulator, do the following:

1. From the **Compliance Manager**, select a regulator from the **Regulator (Categories)** drop-down list in the **Compliance Status** title bar.
2. Click the **Go** button.

   The **Compliance Manager/Regulator Options** page is displayed.
3. Select one or more check boxes to display the desired requirements.
4. Click the **Submit** button.

   The **Regulator Report** page is displayed.

Employee Manager

The **Employee Manager** page displays selected staff and their employee account information including user name, employee title, office, department, number of bulk tracking seats (The tracking for subscription packages is observed in the **University** Tab under the **Products Purchased** section. This information can be exported to excel.), whether the employee has a learning seat, and whether the firm owns the employee's account.

To view the Employee Manager report, do the following:

1. Click the **Employees** tab.

   The **Employee Manager** page is displayed.
2. Click **Employee Manager** from the **Global Menu** located on the left side panel.

The **Employee Manager** page is displayed.

Note: Use the **Report Filtering** feature on the left side panel to sort by employees or regulators.

Create On-Demand Reports

Checkpoint Learning provides customizable templates that can be edited to run reports on employees and their on-demand learning progress.

Note: See Use On-Demand Reports to see details about the available report templates.

To create a report, do the following:

1. Click the **Reporting** tab.

   The **Reporting Manager** page is displayed.

2. In the **Action** column, click the **Preview** icon of the desired report.

3. Do any or all of the following, then click the **View Report** button:

   - **Columns to Display -** Select the checkboxes next to the desired columns from the drop-down list.
   - **Course -** Enter the title of the desired course.
   - **Course ID** - Enter the ID of the desired course.
   - **College** - Enter the college of the desired course.
   - **Coordinator** - Select the checkboxes next to the desired coordinator from the drop-down list.
   - **Professional** - Enter the first and/or last name of the employee.
   - **Start/End/Evaluation/Credit/Examination/Course Completion Date** - Select the calendar icon to choose date parameters.

Note: Not all options are available for every report.

4. Do any or all of the following:

   - **First Page -** Click to go to the first page.
   - **Previous Page** - Click to go to the previous page.
   - **Next Page -** Click to go to the next page.
   - **Last Page -** Click to go to the last page.
   - **Find | Next** - Enter keywords to find or click **Next** to view the next report.
   - **Export -** Click to export the report in different formats.
   - **Refresh -** Click to refresh the page.

Use the Reporting Tab Reports

Checkpoint Learning provides customizable templates to run reports on employees and their on-demand learning progress.

Several templates are available in Checkpoint Learning on the **Reporting** tab. Click the following template names to view more information about how to run these reports.

Average Number of Attendees per Course

This report lists the average number of attendees and direct deposits issued based on the organizations in-house courses.

Available Column	Description
Avg. Direct Deposits	Indicates the average number of direct deposits received for a course or course activity.
Avg. Registrants	Indicates the average number of employees received for a course or course activity.
College	Indicates the provider of the course.
University	Indicates the program source such as the firm's University and course options or Thomson Reuters University and course options.
Course	Indicates the program.

Course "Starts" Report for Usage

This report lists launched on-demand courses.

Available Column	Description
Start Date	Indicates the date a particular course activity was started.
Course Title	Indicates the title of the learning activity.
Course ID	Indicates the data entered in the Course Code field within the course profile.
Credits	Indicates the number of credits earned by completing the course activity.
Account Name	Indicates the number of credits earned by completing the course activity.
Account ID	Indicates the organization’s ID as assigned by Checkpoint Learning.
Professional	Indicates the name of the individual assigned to the record.
College	Indicates the provider of the course.
Sponsor	Indicates the provider of the course.
Number of Course Titles	Indicates the total number count of course titles pulled within a search.
Number of Course IDs	Indicates the total number of course code fields that have data entered within a search.

Available Column	Description
Number of Professionals	Indicates the total number count of employees within a search.
Number of Colleges	Indicates the total number count of colleges within a search.
Number of Sponsors	Indicates the total number count of sponsors within a search.

Course Completion Report for Usage

This report lists completed on-demand course activities.

Available Column	Description
Completion Date	Indicates the date a particular course activity was completed.
Course Title	Indicates the title of the learning activity.
Course ID	Indicates the data entered in the Course Code field within the course profile.
Credits	Indicates the number of credits earned by completing the course activity.
Account Name	Indicates the number of credits earned by completing the course activity.
Account ID	Indicates the organization's ID as assigned by Checkpoint Learning.
Professional	Indicates the name of the individual assigned to the record.
College	Indicates the provider of the course.
Sponsor	Indicates the provider of the course.
Number of Course Titles	Indicates the total number count of course titles pulled within a search.
Number of Course IDs	Indicates the total number of course code fields that have data entered within a search.
Number of Account Names	Indicates the total number count of the organizations that own the college/sponsor of the activity.
Number of Account ID	Indicates the total number count of the organization IDs assigned to the organization by Checkpoint Learning.
NASBA Field of Study	Indicates the field(s) of study applied to the course.

Courses Ordered Report

This report lists Thomson Reuters courses ordered by professionals and approved by coordinators.

Note: Firms who purchase the custom course order form will see data in this report.

Available Column	Description
Coordinator	Indicates the name of the administrator for firms with custom order forms.

Available Column	Description
Professional	Indicates the name of the individual assigned to the record.
CLIN	Indicates the IRS number assigned to a course.
Course Title	Indicates the title of the learning activity.
CPE Credits	Indicates the number of hours earned for the program.
Course Request Date	Indicates the date the course was requested. This is used by firms with custom order forms.
Course Approval Date	Indicates the date the course was approved by the Coordinator. This is used by firms with custom order forms.
Course Request Status	Indicates the status or a course request: requested or approved.
Professional Email	Indicates the employees email address.

Free Form Responses Report for Evaluations

This report lists the data entered in the comment or text boxes in evaluations.

Available Column	Description
Evaluation Date	Indicates the date in which the evaluation was completed by the employee.
Course Title	Indicates the title of the learning activity.
Course ID	Indicates the data entered in the Course Code field within the course profile.
Authors	Indicates the author of the course.
Instructor	Indicates the instructor of the course.
Evaluation Question	Indicates the questions asked in an evaluation.
Evaluation Form Template	Indicates the evaluation form used to evaluation the program.
Evaluation Comments	Indicates the comments made in the comments section of the evaluation.
Number of Course Titles	Indicates the total number count of course titles pulled within a search.
Number of Course ID	Indicates the total number of course code fields that have data entered within a search.
Number of Authors	Indicates the number of authors for a program.
Number of Instructors	Indicates the number of instructors for a program.
Number of Evaluation Questions	Indicates the number of evaluation questions in a given evaluation.

Issued Credits Report for Usage

This report lists on completed on-demand courses that have credits issued to professionals.

Available Column	Description
Credit Date	Indicates the date in which credit was issued to the employee.
Course Title	Indicates the title of the learning activity.
Course ID	Indicates the data entered in the Course Code field within the course profile.
Account Name	Indicates the number of credits earned by completing the course activity.
Account ID	Indicates the organization’s ID as assigned by Checkpoint Learning.
Professional	Indicates the name of the individual assigned to the record.
College	Indicates the provider of the course.
Sponsor	Indicates the provider of the course.
Regulator	Indicates the state or license or jurisdiction.
Number of Course Titles	Indicates the total number count of course titles pulled within a search.
Number of Course ID	Indicates the total number of course code fields that have data entered within a search.
Number of Account Names	Indicates the total number count of the organizations that own the college/sponsor of the activity.
Number of Account ID	Indicates the total number count of the organization IDs assigned to the organization by Checkpoint Learning.
Number of Professionals	Indicates the total number count of professionals within a search.
Number of Colleges	Indicates the total number count of colleges within a search.
Number of Sponsors	Indicates the total number count of sponsors within a search.
Number of Regulators	Indicates the number of states, licenses, or jurisdictions selected.

Lists of What Professionals Have Registered For and Taken

This report lists the in-house courses your professionals have registered for or taken.

Available Column	Description
Name	Indicates the name of the report.
Course Title	Indicates the title of the learning activity.
Title	Indicates the title of the employee.
Department	Indicates the department of the employee.
Office	Indicates the office of the employee.
Course Started	Indicates an on-demand course.
Registered	Indicates a live course.
Direct Deposits	Indicates whether credits were issued for attending the course.

Available Column	Description
Live Event Date	Indicates the date of the live event.
Course Start Date	Indicates the date the on-demand course was started.

Number of Attendees per Course Activity

This report lists the average number of attendees and direct deposits issued based on the organizations in-house courses.

Available Column	Description
Course	Indicates the parent course title.
Course Activity Title	Indicates the course activity or program title.
Sponsor	Indicates the sponsor of the program, the organization authorized to issue certificates of completion.
Format	Indicates the format or mode in which a course was offered.
Completion Date	Indicates the date a course was completed.
#Registrants	Indicates the number of employees.
#Direct Deposits	Indicates the number of direct deposits; instances where credit was issued.
#Courses Started	Indicates the number of instances a course was started.
College	Indicates the provider of the course.
University	Indicates the University, either Thomson Reuters or Firm Sponsored.

Numeric Responses Report for Evaluations

This report lists the data entered in course activity evaluations.

Available Column	Description
Evaluation Date	Indicates the date an evaluation was answered.
Course Title	Indicates the title of the learning activity.
Course ID	Indicates the data entered in the Course Code field within the course profile.
Authors	Indicates the author of the program.
Instructor	Indicates the instructor of the program.
Evaluation Question	Indicates the evaluation question.
Evaluation Form Template	Indicates the evaluation template used to evaluate the program.
Evaluation Comments	Indicates the evaluation comments from a program.
Number of Course Titles	Indicates the total number count of course titles pulled within a search.
Number of Course ID	Indicates the total number of course code fields that have data entered

Available Column	Description
	within a search.
Number of Authors	Indicates the number of authors.
Number of Instructors	Indicates the number of instructors.
Number of Evaluation Questions	Indicates the number of evaluation questions.
% Answered with Option 1	Indicates the number of employees who responded with this option.
% Answered with Option 2	Indicates the number of employees who responded with this option.
% Answered with Option 3	Indicates the number of employees who responded with this option.
% Answered with Option 4	Indicates the number of employees who responded with this option.
% Answered with Option 5	Indicates the number of employees who responded with this option.
% Answered with Option 6	Indicates the number of employees who responded with this option.
% Answered with Option 7	Indicates the number of employees who responded with this option.
% Answered with Option 8	Indicates the number of employees who responded with this option.
% Answered with Option 9	Indicates the number of employees who responded with this option.
% Answered with Option 10	Indicates the number of employees who responded with this option.

Online Grading Examinations Usage

This report lists the online grading exams completed by employees.

Available Column	Description
OGS Examination Name	Indicates the name of the online grading exam.
Professional	Indicates the name of the individual assigned to the record.
Title	Indicates the title of the employees.
Office	Indicates the office of the employees.
Department	Indicates the department of the employees.
Examination Start Date	Indicates the date the exam was started.
Examination Completion Date	Indicates the date the exam was completed.
Examination Expiration Date	Indicates the date the exam expires.
Number of Attempts	Indicates the number of attempts to pass the course.

Pick N Bundle Report

This report lists the courses selected from purchased course packages.

Available Column	Description
Pick N Bundle Product Title	Indicates the Pick N Bundle title.

Available Column	Description
Course Title	Indicates the title of the learning activity.
Media Format	Indicates the media format.
Marketing Course Description	Indicates the course description.
NASBA Field of Study	Indicates the field(s) of study the applied to the course.
CPE Credits	Indicates the number of credits the course qualifies for.
Bundle Expiration Date	Indicates the date the bundle expires.

Shopping Cart Purchase History

This report lists the courses purchased by employees.

Available Column	Description
Course ID	Indicates the data entered in the Course Code field within the course profile.
Course Title	Indicates the title of the learning activity.
Course Purchased Date	Indicates the date the course was purchased.
Course Status	Indicates whether the course is started or completed.
Employee Name	Indicates the employee's name.
Number of Courses	Indicates the number of courses.
Purchased Mode	Indicates how the course was purchased.
Price	Indicates the price of the course.

Run University Reports

Checkpoint Learning reports on the colleges, course activities, registrations, direct deposits and other features within the University Module.

To run course reports, do the following:

1. Click the **University** tab. The **University** page is displayed.
2. Click the sponsor name from the **University Menu** on the left hand panel. The **Sponsor Profile** page is displayed.
3. Click **Courses** from the **University Menu**. The **Courses** page is displayed.
4. Click **Export to Excel** for a report on the college's course list.

To run course activity reports, do the following:

1. Click the **University** tab. The **University** page is displayed.
2. Click the sponsor of the course activity from the **University Menu** on the left hand panel. The **Sponsor Profile** page is displayed.
3. Click **Course Activities** from the **University Menu**. The **Course Activities** page is displayed.
4. Click the title of a course under **Course Instances**. The **Course Profile** page is displayed.
5. Go to **Course Activity Management** on the left hand panel under **University Menu**. Do any of the following:

The following reports are run from within a **Course Activity Profile**.

To run a report of employees registered for a Course Activity Profile, do the following:

1. Click **Registration** from the **Course Activity Management** menu. The **Registration** page is displayed.
2. Click the **Export to Excel** link located to the right of the **Registration List** bar.

To run a report of employees evaluations, do the following:

1. Click **Evaluations** from the **Course Activity Management** menu. The **Evaluations** page is displayed.
2. Scroll down and click the **View Summary** link under the **Evaluations** bar. The **Summary Standard Evaluation** page is displayed.
3. Click the **Export to Excel** link located to the right of the **Course Activity Details** bar.

Note: Only evaluation summaries can be exported. Reports cannot be run on the Evaluation themselves.

To run a report of employees certificates, do the following:

1. Click **Certificates** from the **Course Activity Management** menu. The **Certificates** page is displayed.
2. Scroll down and click the view certificates list icon in the **Action** column under the **Issued Certificates by Template** bar.
3. Click the **Export to Excel** link located to the right of the **Issued Certificates** bar.

To run a report of employees direct deposit, do the following:

1. Click **Direct Deposit** from the **Course Activity Management** menu. The **Direct Deposit** page is displayed.
2. Click the **Export to Excel** link located to the right of the **Course Activity Details** bar.

Note: Go to the **Filter Employee List** section on the left hand panel, select the filtering criteria and click **Filter** to filter the results or **Clear** to clear the filtering parameters.

Perform a Registration Search

Checkpoint Learning provides a list of employee registrations and direct deposits. This list can be sorted by date, employee, course title and direct deposits received.

To perform a registration search, do the following:

1. Click the **University** tab.

   The **University** page is displayed.

2. Scroll down and click the **Registrations Search** link from the left hand pane under the **Search Course Activities** section.

   The **Registrations Search** page is displayed.

3. Do any or all of the following, then click the **Search** button.

4. In the **Course Activity Criteria** section, select the following information:

   - **Course Activity Status –** Select the appropriate radio button
   - **Formats –** Select the course activity format from the list.
   - **Sponsors –** Select the appropriate sponsor from the list.
   - **Starting no earlier than/Starting no later than** – Select the calendar icon to choose date parameters.

5. In the **Registrant Criteria** section, do the following:

   - **Administrative Groups** – Scroll to select administrative groups.
   - **Group Relationship** – Click the appropriate radio button to select group relationship.
   - **Show members of no groups –** Click the appropriate radio button to select member of group.
   - **Has Activity Status –** Click the appropriate radio button to select activity status.

6. The **Registrations Search Results** page displays the:

   - **Start Date** – Indicates the date a particular course activity was started.
   - **Registrant** – Indicates the name of the employee.
   - **Username** – Indicates the email address of the employee.
   - **Course Activity Title** –Indicates the course activity or program title.
   - **College** – Indicates the provider of the course.
   - **Format** – Indicates the format or mode in which a course was offered.

- **Direct Deposit** –  - Indicates the employee was registered and received a direct deposit.
   - Indicates the employee was on the roster, but did not receive a direct deposit.

7. To export this report in excel format, click the **Export to Excel** link at the top right hand corner, under the sponsor name.

Run Learning Plan Reports

Checkpoint Learning provides learning plan reports that show the completion status of the courses assigned to employees. There are three basic learning plan reports: All Plans Analysis by Employee, All Plans Analysis by Course, and the individual course assigned analysis.

Note: Each report can be exported to MS Excel by clicking the **Export to Excel** button in the upper right corner of the report.

The **View All Plans Analysis by Employee** report lists all employees, the number of assigned items on each employees learning plan, and the status of the learning plan items (registered, completed, or no action).

To view the All Plans Analysis by Employee report, do the following:

1. Click the **Learning Paths** tab.

   The **Learning Paths** page is displayed.

2. Click **Learning Plan Report** from the **Learning Paths Menu** on the left side panel.

   The **Learning Plan Reports** page is displayed.

3. Click sponsors from the **Select Sponsor** section drop-down lists on the left side panel.
4. In the **All Plans by Employee** section, click the link **View 'All Plans Analysis by Employee'**.

   The **All Plans Analysis by Employee** report page is displayed.

Note: Click the column heading to sort by employee, title, office, department, total, no action, registered/waitlisted/in progress, or completed. Click the employee name to view his/her learning plan.

The **View All Plans Analysis by Course** report lists the organization's course offerings and the number of employees assigned to each course including the status of completion.

To view the All Plans Analysis by Course report, do the following:

In the **All Plans By Course** section, click **View 'All Plans Analysis by Course' for (the Selected Sponsor)**.

The **Learning Plans All Courses Analysis** report page is displayed.

Note: Click the column heading to sort by course, total plans, no action, registered/waitlisted/in progress, completed, waived, mandatory, optional, or past due. Click the course title to view the Course Profile.

The **Learning Plans Single Course Analysis** report lists the employees assigned to a course, whether the course is mandatory for the employee, the target date of completion, and the status of the course (such as registered, completed, or no action).

To view the Learning Plans Single Course Analysis report, do the following:

In the **Course Reports for Selected Sponsor** section, click any of the course titles to view the employee assigned and their respective status.

The **Learning Plans Single Course Analysis** page is displayed.

Note: Click the Learning Plans section column heading to sort by name, title, office or practice. Click the employee's name to view his or her learning plan.

Create Customized Reports

Checkpoint Learning enables Firms to generate copies of the data within the Firm account. The data is available in the form of an MS Access database. Administrators can determine the set of data pulled in the database filtering by date and regulators.

To create customized reports do the following:

1. Click the **Settings** tab.

   The **Organization Profile** page is displayed.

2. Click **Data Export** from the **Settings Menu** located on the left side panel.

   The **Data Export** page is displayed.

3. In the **Activity Filter** section, filter data by date and/or by the regulators mentioned.

Note: Checkpoint Learning recommends filtering by date and selecting all regulators when generating a database. If an individual regulator is not selected, all regulators will be chosen automatically.

4. Click the **Generate Database** button.

   The Administrator will receive an email from the system when the database is ready.

5. Once the email is received, navigate to the **Settings** tab and select **Data Export** on the left side panel. The **Data Export Page** is displayed.
6. In the **Data Export** section, the export file link is displayed. The link is date and time stamped according to when the database was generated.
7. Click the link and choose **Save As**. The dialog box is displayed.
8. Select a location to save the file.
9. Click the **Save** button.
10. Navigate to the saved file.
11. Right-click the file. Select **Extract All**.
12. Browse the location for the extracted data and click the **Extract** button.
13. Click the database to open the extracted data.

Note: To access **Commonly Used Reports** (**SQL Queries**), click here.