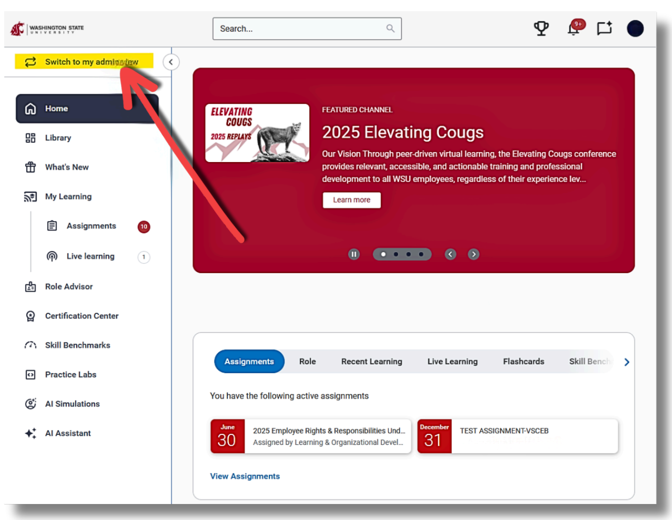
RUNNING REPORTS IN PERCIPIO

Tracking employee training compliance

This guide will walk you through the process of running Assignment reports in Percipio to track employee required assigned training. These reports are essential for ensuring that all employees complete their required training within the specified time frames, which helps maintain a safe and compliant work environment.

Accessing the Admin Menu

1. **Log in to Percipio**: Use your Network ID and password to access Percipio.
2. Navigate to the Administrative Menu: Once logged in, locate the 'Switch to admin view' option in the upper left hand corner under the WSU logo.

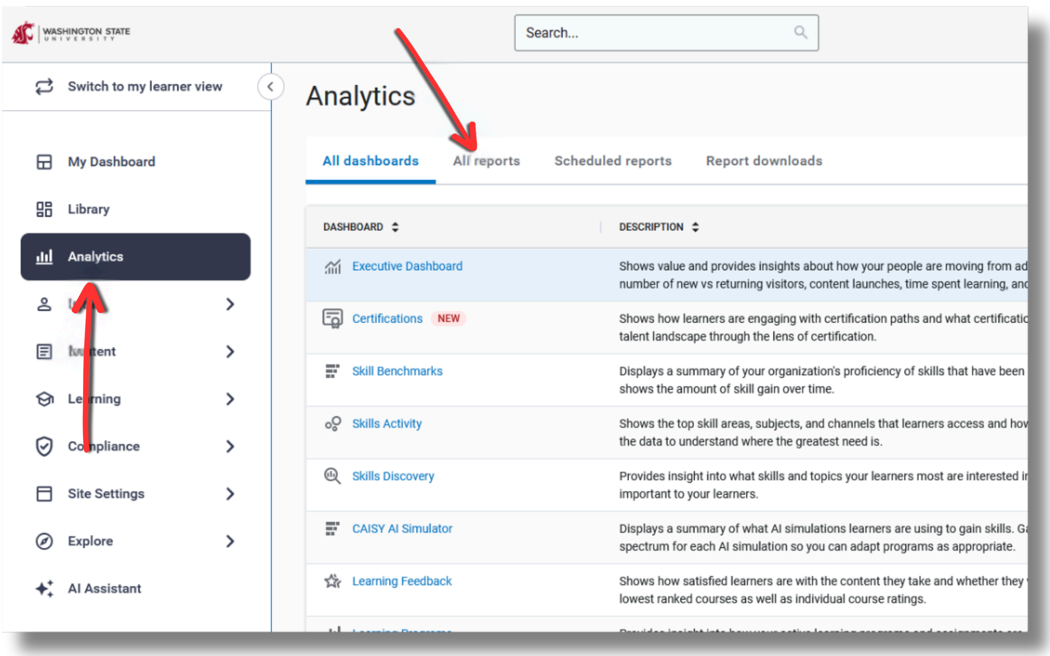


Screenshot of learner home page, 'switch to admin menu' is highlighted in yellow with a red arrow pointing to it.

Note
The exact appearance of your home page may vary, but the general navigation will be the same.

Navigating to Reports

1. Navigate to Analytics: From the administrative menu on the left hand side, select ‘Analytics’, third down from the top.
2. Select ‘All Reports’.



Screenshot of Analytics menu with red arrows pointing to ‘Analytics’ in the administrative menu and ‘All reports’ in the Analytics menu.

Selecting Your Report and Setting your Parameters

Assignment Detail by User Report

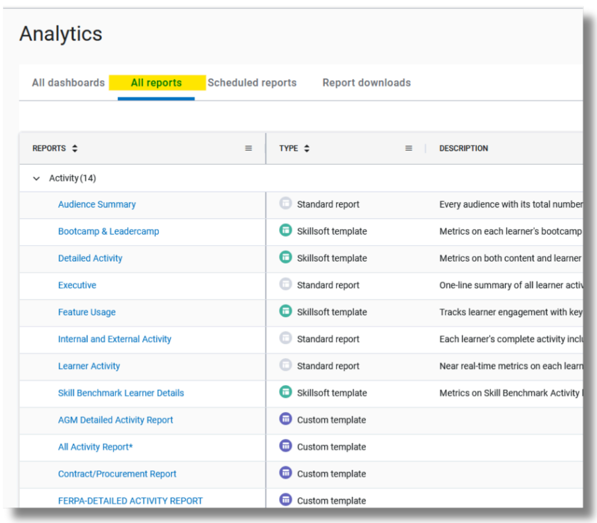
The reports list is long and an exhaustive list, you will need to scroll down the list to find the assignment detail by user report.

The assignment detail by user report uses near real-time data to show each individual learner’s activity and progress on each content item within an assignment.

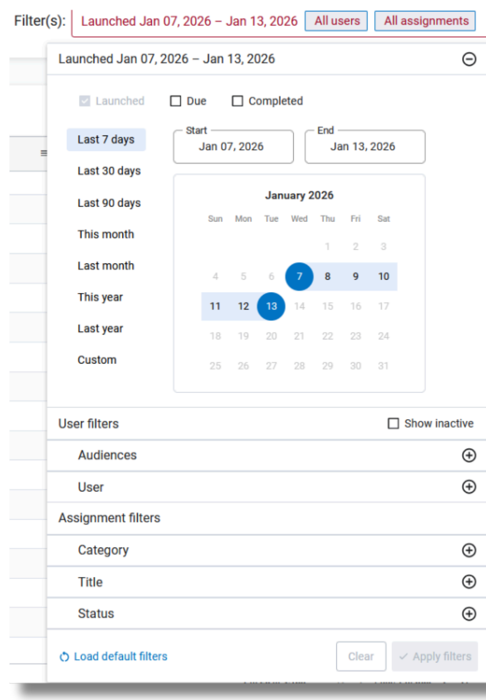
The filters for reports are selected by opening the drop down menu (red outlined box) and expanding a series of plus signs. Once you've chosen your filters, select 'Apply filters' to run your report.

Recommend filters to set for this report include:

1. Date range
   a. This includes the option to select check boxes for 'launched', 'due', and 'completed'
2. User filters (you can search by individual user or audience)
3. Assignment filters for category and title, though we primarily search by title
4. Status of assignment, this would include whether an assignment is active, archived, or canceled



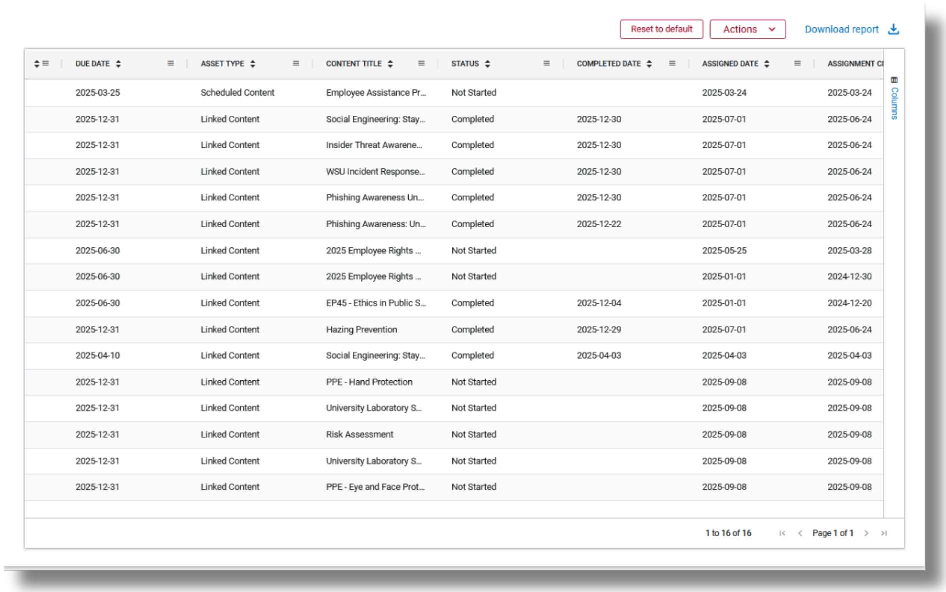
Screenshot of the 'All reports' list in the Analytics menu.



Screenshot of report filters from the assignment detail by user report.

Steps to finish running your report:

1. After you've selected your date range, expand the plus signs for each filter and select **red** 'Apply filters' button on the right to run your report and update the data on the page. Do not click the 'load default filters' button.
2. The results will display in the table below.
3. Several columns of information are displayed by default.



Reset to default | Actions | Download report

DUE DATE	ASSET TYPE	CONTENT TITLE	STATUS	COMPLETED DATE	ASSIGNED DATE	ASSIGNMENT CI
2025-03-25	Scheduled Content	Employee Assistance Pr...	Not Started		2025-03-24	2025-03-24
2025-12-31	Linked Content	Social Engineering: Stay...	Completed	2025-12-30	2025-07-01	2025-06-24
2025-12-31	Linked Content	Insider Threat Awarene...	Completed	2025-12-30	2025-07-01	2025-06-24
2025-12-31	Linked Content	WSU Incident Response...	Completed	2025-12-30	2025-07-01	2025-06-24
2025-12-31	Linked Content	Phishing Awareness Un...	Completed	2025-12-30	2025-07-01	2025-06-24
2025-12-31	Linked Content	Phishing Awareness: Un...	Completed	2025-12-22	2025-07-01	2025-06-24
2025-06-30	Linked Content	2025 Employee Rights ...	Not Started		2025-05-25	2025-03-28
2025-06-30	Linked Content	2025 Employee Rights ...	Not Started		2025-01-01	2024-12-30
2025-06-30	Linked Content	EP45 - Ethics in Public S...	Completed	2025-12-04	2025-01-01	2024-12-20
2025-12-31	Linked Content	Hazing Prevention	Completed	2025-12-29	2025-07-01	2025-06-24
2025-04-10	Linked Content	Social Engineering: Stay...	Completed	2025-04-03	2025-04-03	2025-04-03
2025-12-31	Linked Content	PPE - Hand Protection	Not Started		2025-09-08	2025-09-08
2025-12-31	Linked Content	University Laboratory S...	Not Started		2025-09-08	2025-09-08
2025-12-31	Linked Content	Risk Assessment	Not Started		2025-09-08	2025-09-08
2025-12-31	Linked Content	University Laboratory S...	Not Started		2025-09-08	2025-09-08
2025-12-31	Linked Content	PPE - Eye and Face Prot...	Not Started		2025-09-08	2025-09-08

Columns

1 to 16 of 16 | Page 1 of 1

Screenshot of report results in a table.

4. After applying filters and running the report, the table can be customized (**optional, but recommended**):
   - **Sorting**: Click column arrow for ascending/descending
   - **Filters**: Column-level filters (e.g., equals, contains, ranges)
   - **Pinning**: Pin columns left or right to freeze them, scroll left to right to search for information. For example you can pin the first or last name column and then scroll to the right through the table to view information without losing the name of the employee
   - **Auto-sizing**: Adjust column widths to fit content
   - **Grouping**: Aggregate by column (e.g., user role, status) with drag-and-drop grouping

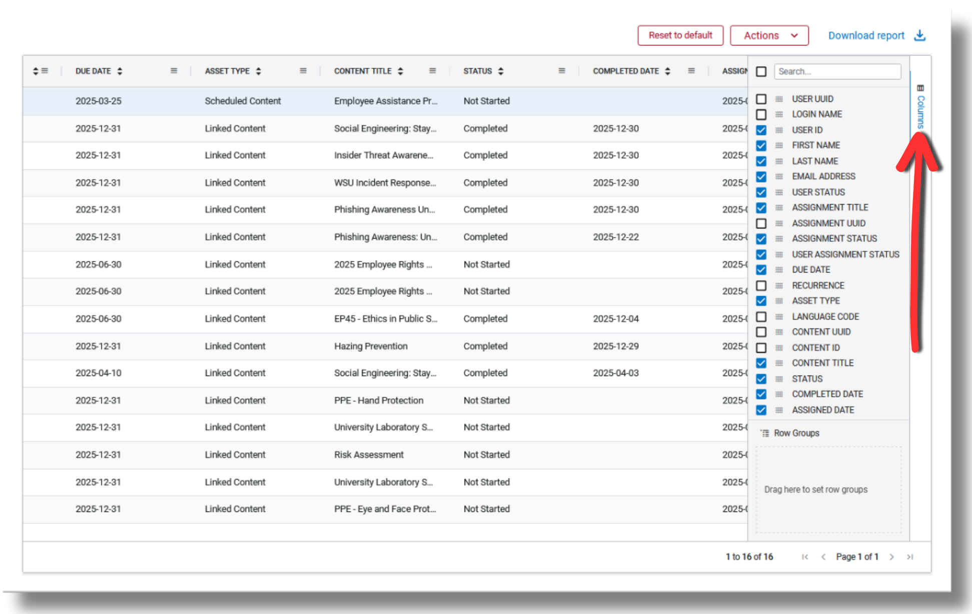
Before you download the report

it is recommended that you arrange your columns with the most important information first by grabbing the hamburgers (three stacked lines on the right hand side of each column) and dragging them to the left or right.

A number of columns are displayed by default, but you can expand the columns menu on the far right hand side of the screen and add or remove columns. Below is a recommended list of columns to include each time you run your report to exclude extraneous data and include only the necessary data. A list of these column titles and descriptions can be found on the [Assignment Detail by User Report knowledge base article here](#).

Recommended Columns:

- User Status
- Email Address
- First Name
- Last Name
- Employee ID
- Assigned by Last Name
- Assigned Date
- Hire Date
- Due Date
- User Assignment Status
- Content Title
- Status
- Completed Date
- Assignment Created Date
- Overdue
- Score
- Learning Hours (HHMMSS)
- Estimated Duration
- Assignment Status
- Assignment Title



Screenshot of reports table with red arrow pointing to the columns menu, toggled open.

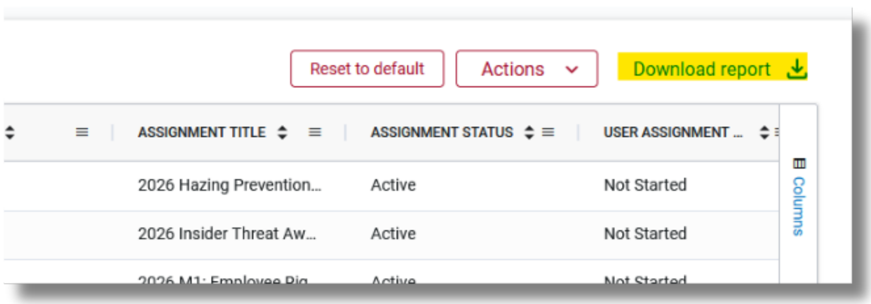
Need Extra Help?

Check out the [knowledge base article](#) for this report.

Downloading and Viewing the Report

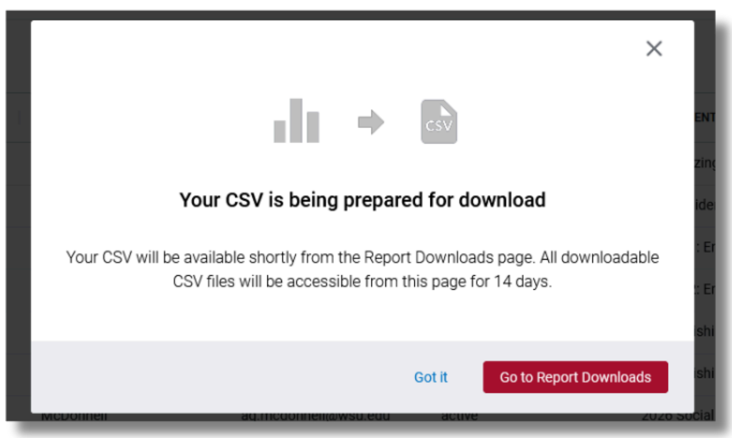
Percipio allows you to export the report data to Excel for further analysis or record-keeping.

1. In the upper right hand corner of the reports table, select 'Download report'.



Screenshot of reports table with Download report highlighted.

2. A pop-up window will appear notifying you that your CSV (comma separated values) is being prepared for download, click the red 'Go to Report Downloads' button.

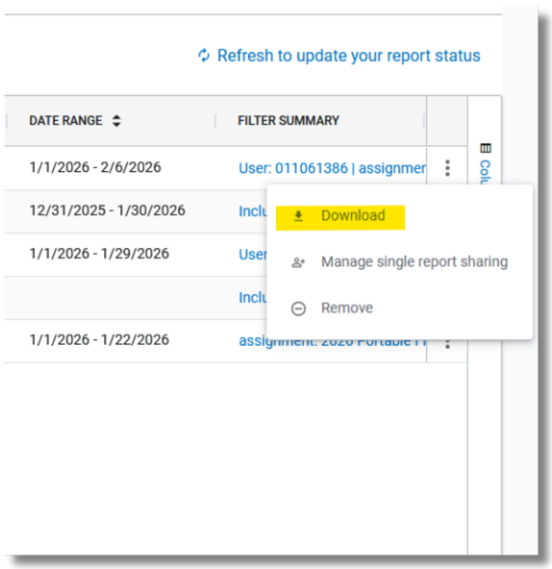


Screenshot of pop-up window CSV file being prepared for download.

FYI

You will receive a warning "any unsaved changes will be lost. Are you sure?". You can select 'Yes, discard changes' to continue to access your CSV file, or 'No, keep working' to stay on the current page and continue working with your report.

3. The Reports Download tab is where you can view your CSV files or the progress of a report's CSV file preparation. All CSV files are available for 14 days after successful generation.
4. To download your report, select the three dots on the far right next to the report you would like to download, and select 'Download'.

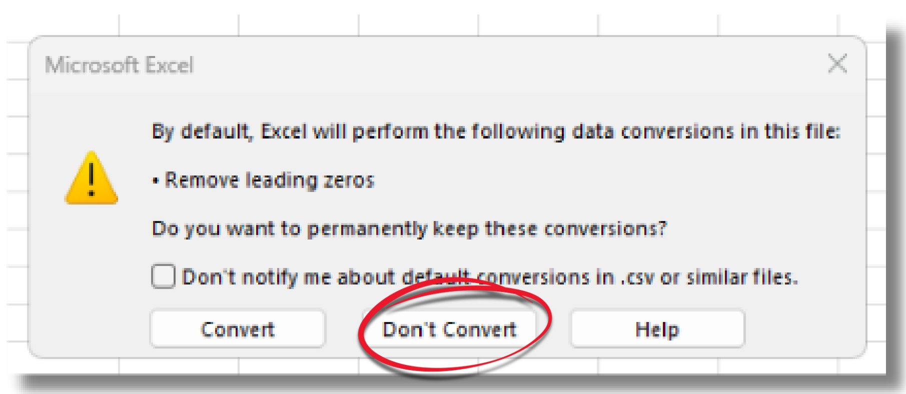


Screenshot of reports download option.

5. Go to your browser downloads or from your downloads folder in your file explorer and open the CSV file into Excel.

Interpreting the Report Data

When the CSV opens in Excel, you will typically see a warning notification window appear explaining Excel wants to remove the leading zeros in the data from the report. Select the middle option 'Don't Convert'.

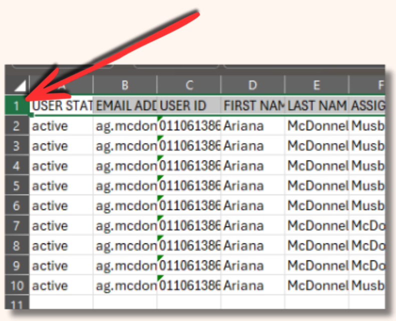


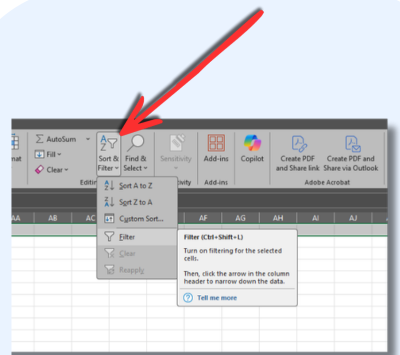
Screenshot of warning notification in Excel.

Recommended Excel Steps to Interpret Report Data:

1. [To autofit all columns on the worksheet](), choose 'Select All', and then double-click any boundary between two column headings. Highlight the first row by clicking row '1'

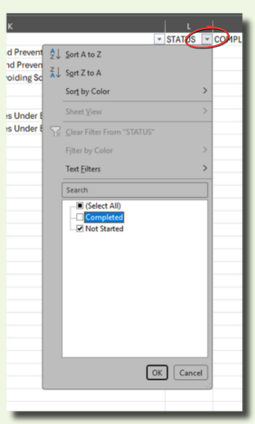
2. In the header ribbon, select the 'Sort & Filter' tool and choose the 'Filter' icon from the drop down

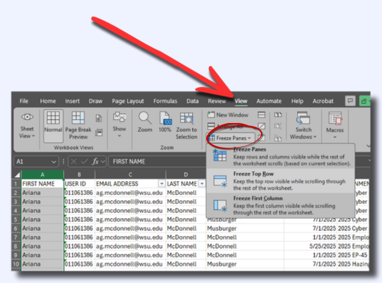




3. Use the filters in your column headers to sort by completion status. Uncheck completed.

4. Select 'View' from the header ribbon and then choose 'Freeze Panes' from the drop down menu. Freeze top row, or first column





The compliance report provides valuable insights into the training status of your employees. Use the data to:

- Identify employees who have not completed the required training.
- Track completion rates for employees.
- Monitor progress toward overall compliance goals.
- Proactively address any potential compliance issues.

More Options and Resources

Links to Percipio Knowledge Base articles:

  - Create a template
  - Schedule Reports
- Learning Administrator Percipio Channel

Additional Helpful Reports

1. **Detailed Activity Report:** Shows metrics on both content and learner activity for access, time learning, completions, and more. An important consideration regarding this report is it will not populate results for courses employees have not accessed. The data in this report is refreshed every 18 hours. Check out the knowledge base article for this report here.
2. **Learner Activity Report:** Shows near real-time metrics on each learner's activity including time learning and completions. Data is refreshed continuously. Check out the knowledge base article for this report here.

Next Steps

Now that you understand how to run compliance reports, practice generating reports for different courses, date ranges, and departments. If you have any questions or encounter any issues please send an email to hrs.training@wsu.edu.