My Health Learning Local Reporting Role

Information Booklet

V3.0 July 2018

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Audience & Access

This document is a guideline for staff who have My Health Learning Local Reporting Role access. The Local Reporting Role (LRR) enables staff to run reports for their facility/service to monitor mandatory training compliance and completions in both classroom and online courses.

If you no longer require access to this role, please notify SWSCEWD to remove your access.

Key Reports

Mandatory training compliance/gap reports

1. **050 - Mandatory Training Report**
   - This report provides you with a detailed list of staff who are **compliant & non-compliant** in all mandatory training courses
   - This report can be run for the entire facility/service or professional user groups within the facility/service
   - Professional groups are created following the Mandatory Training Policy & Matrix guidelines. The user groups are Nursing & Midwifery, Medical & Dental, Allied Health and Corporate.

2. **050.1 - Organisation Mandatory Training Matrix**
   - This report provides you with a **summary % of compliance** in all mandatory training courses
   - This report can only be run for the entire facility/service
   - This report allows you to remove staff who are on extended leave from the data extract.

   > (The extended leave indicator is calculated in My Health Learning based on the 'last date of pay' information imported from Stafflink. Any employee record that exceeds 90 days from the last pay date gets an 'on extended leave' indicator in My Health Learning. This could include casual pool staff not working with the facility/service, maternity leave, long service leave, extended sick leave, etc. The extended leave indicator is turned off as soon as the staff returns to work and crosses the first pay cycle within their nursing/non-nursing pay cycle; which enables their updated pay date to be imported in My Health Learning.

3. **050.2 - Mandatory Training Summary Report**
   - This report provides you with a detailed list of staff who are **compliant** in all mandatory training courses
   - This report can be run for the entire facility/service or professional user groups within the facility/service
   - Professional groups are created following the Mandatory Training Policy & Matrix guidelines. The user groups are Nursing & Midwifery, Medical & Dental, Allied Health and Corporate.

Reports for general courses (online & classroom)

1. **002 - Classroom Enrolments and Current Status**
   - This report allows you to run reports on any **classroom course** that is offered by SWSCEWD or by a single class (offering) within a course
   - This report can be run for the entire facility/service or professional user groups within the facility/service
   - Professional groups are created following the Mandatory Training Policy & Matrix guidelines. The user groups are Nursing & Midwifery, Medical & Dental, Allied Health and Corporate.

2. **003 - Online and Certification Offering Enrolments Status**
   - This report allows you to run reports on any **online course** that is offered by **HETI or SWSCEWD** and may/may not be part of the mandatory training requirement
   - This report allows you to run reports on any online course that has recurrence (certification) requirement. For example, Fire Safety and Evacuation (online) which has an annual recurrence (certification) requirement
   - This report can be run for the entire facility/service or professional user groups within the facility/service
   - Professional groups are created following the Mandatory Training Policy & Matrix guidelines. The user groups are Nursing & Midwifery, Medical & Dental, Allied Health and Corporate.

3. **005 – Learning Path Status Details**
   - This report allows you to run **reports on any pathway** such as the Financial Management Essentials pathway or Medical Officers Orientation pathway etc.
   - This report can be run for the entire facility/service

Top level steps for Running Reports

1. Change your role to Local Reporting Role
2. Search for a relevant report
3. Click on Run >> Schedule Reports
4. Enter relevant parameter criteria in each tab
5. Schedule the report
6. Data will be emailed to your mailbox

Changing Roles

In addition to the Local Reporting Role you may have one or all of the following roles in My Health Learning: **Learner, Manager, Manager Delegate, Instructor or Scheduler**. These roles have a defined hierarchy in My Health Learning. Every time you log on to My Health Learning, the system will open with your most senior role within the system. To ensure accurate reports are generated, ensure you change to the **Local Reporting Role** prior to running any reports.

Hover over your primary role to bring up all roles you have access to. **Click on the Local Reporting Role** to change your level of access.
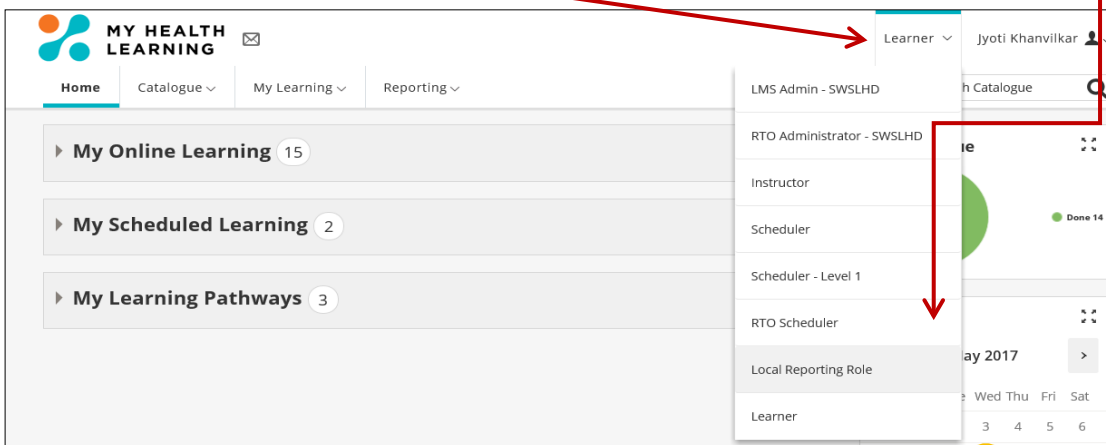
Running Reports

Click on the **Reporting tab** >> Click on **My Reports** to bring up all reports you have access to.
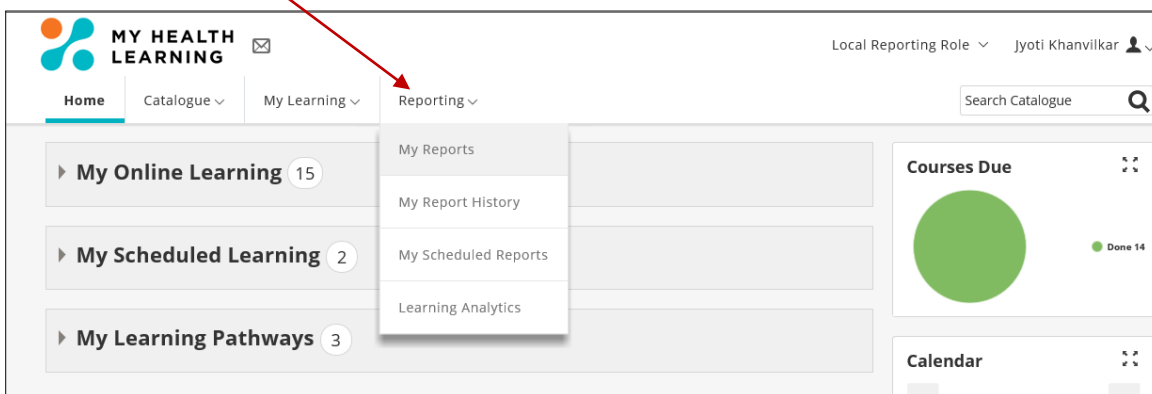
A list of all reports that you have access to will be displayed.

Depending on the report you wish to run, **search for the report number or title** by typing your search requirements in the **search box**. Click on **Run.**

Scroll down on the next window and click on **Schedule Report**

The following pages provide images of recommended entries within the 6 key reports.

050 - Mandatory Training Report

After you **click on Schedule Report**, the **Details** tab will be opened up as shown below:

Ensure the **Report Format** is selected at **CSV (Excel)** >> Click on **Next**

The next window - **Parameters will come up as follows**

1. **Organisation** >> Search for your facility/service by clicking on the search button

2. **Manager** leave as **%**

3. **Direct Reports** = No

4. **Folder type** = Mandatory

5. **Folder** leave as %

6. **Content Object** leave as %

7. **Outstanding only** = No

8. **Job Targeting** leave as %

Click on **Next** after the above 8 parameters are set

The **Recipients** window will open up as follows

1. **To Address** >> your email address will be populated automatically. You can add additional email addresses by adding a comma and one space.

2. **Email Subject** leave as is populated automatically.

3. **Attachment Filename** leave as is populated automatically.

4. **Click on Yes** to the next three options

5. Add a file name with **.zip** extension

Reports > View

050 - Mandatory Training Report (19072018010037)

Details — Parameters — Recipients — Schedule — Confirmation

* TO Address: Jyoti.Khanvilkar@health.nsw.gov.au

* Email Subject: 050 - Mandatory Training Report (19072018010037)

* Attachment Filename: report_result.csv

Send Email / File if no results returned: ●Yes ○No

Include Column Headings ●Yes ○No

Compressed Zip File: ●Yes ○No

Compressed Zip Filename: mt.zip

* Mandatory fields

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Click on **Next** after the above parameters are set.

Reports > View

050 - Mandatory Training Report (19072018010037)

Details — Parameters — Recipients — Schedule — Confirmation

Select Option: ●Run Once - Now ○Run Once - Later ○Schedule

* Mandatory fields

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If you are running the report as a '**once-only'** requirement, click on **next** at the above window.

If you want to set up a regular frequency of the same report to be emailed to you at your preferred frequency, **click** on the **Schedule.**

The next window will open up.

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1. **Job Frequency** >> click on the drop down and choose your preferred frequency.

2. **Start date** >> click on the calendar and choose your start date.

3. **Start time >>** select an off peak time

4. **Click on Next**

050.1 - Organisation Mandatory Training Matrix

Follow the same steps as the previous report.

1. Search for the report
2. Click on Run
3. Click on Schedule Reports
4. Click on Next
5. Parameters window >> follow the instructions below

1. **Organisation** >> Search for your facility/service by clicking on the search button

2. **On Extended Leave** >> leave as **N**

3. **Folder type** = Mandatory

4. **Folder** leave as %

5. **Content Object** leave as %

The **Recipients** and **Schedule** tab information instructions are similar to report 050.

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050.2 - Mandatory Training Summary Report

This report has the exact same options as 050 Mandatory Training Report. Some parameters are not in the same order, however the information to be entered remains the same.

002 - Classroom Enrolments and Current Status

Follow the same steps as report 050, until you get to the Parameters Window:
1. Search for the report
2. Click on Run
3. Click on Schedule Reports
4. Click on Next
5. Parameters window >> follow the instructions below

1. **Classroom Object** >> Select this option >. Search for course/s that you wish to run the report on or leave as % if you want to run a report on all classroom courses.

2. **Organisation** >> search for your facility/service

3. **Use Completed Date** = yes

4. **Date from** leave as % or select the date

5. **Date to** leave as % or select the date

6. **Manager** leave as %

7. **Status** >> Completed

8. Select **No** for next two options and leave **Yes** for last two options

Reports > View

002 - Classroom Enrolments and Current Status (19072018020227)

① Details — ② Parameters — ③ Recipients — ④ Schedule — ⑤ Confirmation

* ○ Scheduled Offerings Folder
  ● Classroom Object   %
  ○ Offering

* ● Organisation
  ○ User Group   %
  ○ User

* Use Completed Date: Yes

* Date From: %

* Date To: %

* Manager: %

* Status: Completed

* Include Unenrolments: No

* Direct Reports Only: No

* Active Users: Yes

* Published: Yes

* Mandatory fields

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The **Recipients** and **Schedule** tab information instructions are similar to report 050.

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003 - Online and Certification Offering Enrolments Status

Follow the same steps as report 050, until you get to the Parameters Window:
1. Search for the report
2. Click on Run
3. Click on Schedule Reports
4. Click on Next
5. Parameters window >> follow the instructions below

9. **Offering** >> Select this option >. Search for course/s that you wish to run the report on or leave as % if you want to run a report on all online courses.

10. **Organisation** >> search for your facility/service

11. **Status** >> Completed

12. **Date Range** = Yes

13. **Date from** leave as % or select the date

14. **Date to** leave as % or select the date

15. **Manager** leave as %

16. **Specialty Code** leave as %

17. **Direct Reports** Only = No

18. **Active Users** = Yes

19. **Sex** = %

20. **Include Unenrolments** = No

21. **Published** = Yes

22. Last 2 options = %

Reports › View

003 - Online and Certification Offering Enrolments Status (19072018021423)

| Details | Parameters | Recipients | Schedule | Confirmation |

* O Folder
  ◉ Offering — %

* ◉ Organisation
  O User Group
  O User — %

* Status: Completed

* Date Range - Yes(Last Completed) No(Status Update): Yes

* Date From: %

* Date To: %

* Manager: %

* Specialty Code: %

* Direct Reports Only: No

* Active Users: Yes

* Sex: %

* Include Unenrolments: No

* Published: Yes

* Position Classification Targeting: %

* Job Targeting: %

* Mandatory fields

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The **Recipients** and **Schedule** tab information instructions are similar to report 050.

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005 – Learning Path Status Details

Follow the same steps as report 050, until you get to the Parameters Window:

1. Search for the report
2. Click on Run
3. Click on Schedule Reports
4. Click on Next
5. Parameters window >> follow the instructions below

24. **Learning Pathway** >> search for relevant pathway and select. Only one pathway can be selected at a time

25. **Organisation** >> search for your facility/service

26. **Active Users** = Yes

27. **Manager** leave as %

28. **Direct Reports** Only = No

Reports > View

005 - Learning Path Status Details (19072018022030)

Details	Parameters	Recipients	Schedule	Confirmation

* Learning Pathway: <Please select>

* ⦿ Organisation
  ○ User Group   %
  ○ User

* Active Users: Yes ▾

* Manager: %

* Direct Reports: No ▾

* Mandatory fields

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The **Recipients** and **Schedule** tab information instructions are similar to report 050.

Contact & Support

The SWS Centre for Education and Workforce Development (SWSCEWD) office hours are

Monday to Friday 8:00am – 5:00pm.

Please direct all enquiries via:
Email: SWSLHD-CEWD@sswahs.nsw.gov.au   or   **Phone**: (02) 8738 5920