

Job Aid: Running Reports: Basic Tasks

Description

The purpose of this job aid is to guide Administrators through the step-by-step process of using the basic tasks to work with reports in SATERN.

Tasks

- A. Access and Search for Reports
- B. Run a Report
- C. Schedule a Report
- D. Save a Report

Task A. Access and Search for Reports

1 Navigate to Reports.

The screenshot shows the SATERN web application interface. The top navigation bar includes 'Learner', 'My Employees', and 'Admin' tabs. Below the navigation bar is a search bar with the text 'Enter Keywords or Command' and a 'Go' button. The main content area is titled 'Reports' and displays a list of 17 reports. The left sidebar contains filters for 'Category (Admin only)', 'Publication Status', and 'Application'. The main content area shows a grid of report cards with titles and descriptions, such as 'Academic Grades (CSV)', 'Account Data', 'Admin Accounts', 'Approval Process Data', 'Approval Role Coverage By Domain', 'Approval Role Coverage By Organization', 'Approval Role Data', and 'Approvals Status'.

- 2 Use the **Search** and **Browse By** features to filter the reports list.
- 3 Click **Submit**.
- 4 Click **Sort By** to sort the reports list by *Title* or by *Category*.

Search: registration (2)

Sort By: Title (4)

Submit (3)

6 Reports

- + [Approvals Status Reports](#)
Displays, for the Learners selected, the status of any Processes they have initiated. Admin...[more](#)
- + [Registration Status](#)
Displays, for the offerings and learners selected a det registration information. This report can...[more](#)
- [Self-Registration/Withdraw](#)
The user Self-Enrollment / Withdraw report returns u: registration information; and scheduled o...[more](#)

- Click:
- 5 • : **Edit icon** to edit the report details, i.e., description, comments.
 - 6 • : **Export icon** to export the report as a zip file.
 - 7 • : **Expand icon** to expand the list of available reports in the report group.
 - 8 • **Click more** to see additional report description.

181 Reports

Sort By: Title

<p>Account Data</p> <p>The Account Data report returns; for each user; account-related information; such as user ID; contact informat...more</p> <p>6</p>	<p>Account Data Legacy</p> <p>The Account Data report returns; for each user; account-related information; such as user ID; contact informat...more</p>
<p>Admin Access</p> <p>Admin Workflows and Domain Restrictions</p> <p>5</p>	<p>Approval Process Data</p> <p>The Approval Process Data report describes approval process template as it is constructed in the administratio...more</p>
<p>Approval Process Data Legacy</p> <p>The Approval Process Data report describes approval process template as it is constructed in the administratio...more</p> <p>8</p>	<p>+ Approval Role Coverage By Domain</p> <p>The Approval Role Coverage report describes the users; or type of users; assigned to an approval role.</p>
<p>+ Approval Role Coverage By Organization</p> <p>The Approval Role Coverage report describes the users; or type of users; assigned to an approval role.</p> <p>7</p>	<p>Approval Role Coverage Legacy</p> <p>The Approval Role Coverage report describes the users; or type of users; assigned to an approval role.</p>

Task B. Run a Report

- 1 Navigate to **Reports**.
- 2 Use the **Search** and **Browse By** features to filter the reports list.
Locate the report you want to run. In this case, let's run the **Registration Status by Scheduled Offering**.
- 3 Click the report title link.

The screenshot shows the SATERN Reports interface. At the top, there are tabs for 'Saved Reports', 'Reports', and 'Report Jobs'. The 'Reports' tab is active, showing '6 Reports' and a 'Sort By: Title' dropdown. On the left, there is a search and filter sidebar. The search bar contains 'registration'. The 'Browse By' section has three categories: 'Category (Admin only)', 'Publication Status', and 'Application'. Each category has several items with checked checkboxes. A 'Submit' button is at the bottom of the sidebar. The main content area displays a list of reports. The report 'Registration Status by Scheduled Offering' is highlighted with a red box and a circled '3'. Other reports include 'Approvals Status Reports' and 'Self-Registration/Withdraw'.

- 4 Modify the report title if necessary.
- 5 Enter a report header and footer to add to the report.
- 6 Select a report destination from the drop-down menu.
- 7 Select a report format from the drop-down menu.
- 8 Click the filter icon to search for and select the scheduled offering(s) to run this report.
- 9 Click to mask or unmask Learner IDs on the report.
- 10 Click Run Report to run the report immediately.

[Browse](#) | [Help](#)

> Run Report

Run Registration Status by Scheduled Offering

Report Title: **4**

Report Header: **5**

Report Footer:

Report Destination: **6**

Report Format: **7**

Mask Learner IDs **9**

Page Break Between Records

Case sensitive search: Yes No

Scheduled Offering: (1000) **8**

Learner: **8**

Company:

From Learning Event Date:

To Learning Event Date:

Registration Status: Enrolled

Waitlisted

Cancelled

Pending

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Note: Only published reports display the Schedule Job button.

Task C. Schedule a Report

- 1 Navigate to **Reports**.
- 2 Use the **Search** and **Browse By** features to filter the reports list.

Locate the report you want to run. In this case, let's run the **Registration Status by Scheduled Offering**.
- 3 Click the report title link.

The screenshot displays the 'Reports' section of the SATERN interface. On the left, a search and filter sidebar is visible. The search bar contains the text 'registration'. The 'Browse By' section includes three categories: 'Category (Admin only)', 'Publication Status', and 'Application'. Each category has several items with checked checkboxes. A 'Submit' button is located at the bottom of the sidebar. The main content area shows a list of reports under the 'Reports' tab. The list includes 'Approvals Status Reports', 'Registration Status', and 'Self-Registration/Withdraw'. The 'Registration Status' report is expanded, showing three sub-links: 'Registration Status (CSV)', 'Registration Status by Scheduled Offering', and 'Registration Status Group By Learner'. The 'Registration Status by Scheduled Offering' link is highlighted with a red circle and the number 3. The 'Reports' tab is highlighted with a red circle and the number 1. The search bar is highlighted with a red circle and the number 2.

- 4 Modify the report title if necessary.
- 5 Enter a report header and footer to add to the report.
- 6 Select a report destination from the drop-down menu.
- 7 Select a report format from the drop-down menu.
- 8 Click the filter icon to search for and select the scheduled offering(s) to run this report.
- 9 Click to mask or unmask Learner IDs on the report.
- 10 Click **Schedule Job** to schedule the report to run as a background job, once at a future date, or on a recurring basis.

Registration Status by Scheduled Offering
[Browse](#) | [Help](#)

> Run Report

Run Registration Status by Scheduled Offering

Report Title: **4**

Report Header:

Report Footer:

Report Destination: **6**

Report Format: **7**

Mask Learner IDs **9**

Page Break Between Records

Case sensitive search: Yes No

Scheduled Offering: (1000) **8**

Learner: **8**

Company:

From Learning Event Date:

To Learning Event Date:

Registration Status: Enrolled
 Waitlisted
 Cancelled
 Pending

10

11 Click the **Schedule this job to be executed on radio button** to schedule the report to run on a specific date and time.

Note: Click **View Available Time Slots** to see a list of times you are allowed to run the report.

12 Click the **Schedule this job to recur as follows radio button** if you wish to schedule the report to run at the specified recurring basis.

13 Click **Finish**.

Note: You may be asked to confirm the job. If so, click **Finished**.

Registration Status by Scheduled Offering

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[> Run Report](#)

Schedule Background Job

You have opted to schedule this report to run in the background. Please complete the following information if you want this action to run at a specific date and time. If you choose to be notified by email upon completion, please select "Notify via email upon completion" checkbox and specify an email address. If you wish, the report file can be emailed to you when it has been generated, or you can download the report file once the report is complete from the Background Report Jobs module or, if the report has been scheduled as a recurring job, you can download the report from the Recurring Report Jobs module.

- Run this job immediately, if allowable.
- Schedule this job to be executed on: [View Available Time Slots](#)

11 **Date:** 
(MM/DD/YYYY)

Time:
(hh:mm AM/PM)

Time Zone:

12 Schedule this job to recur as follows:

- Daily
- Weekly **Day:**
- Monthly **Date:**

Time of Day:
(hh:mm AM/PM)

Time Zone:

Job Description:

Notify via email upon completion

Email:

Email the Report

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Task D. Save a Report

- 1 Navigate to **Reports**.
- 2 Use the **Search** and **Browse By** features to filter the reports list.
Locate the report you want to save. In this case, let's save **Registration Status by Scheduled Offering**.
- 3 Click the report title link.

The screenshot shows the SATERN Reports interface. On the left, there is a search and filter sidebar. The search bar contains the text 'registration'. Below it, the 'Browse By' section is expanded to show several categories with checkboxes: 'Learner Management', 'Performance', 'Learning', 'Content', 'System Admin', and 'Miscellaneous'. Under 'Publication Status', 'Published' and 'Unpublished' are checked. Under 'Application', 'Admin' and 'Lerner' are checked. A 'Submit' button is at the bottom of the sidebar. On the right, the main content area shows a 'Reports' tab selected, with a 'Sort By: Title' dropdown. Below this, a list of reports is displayed. The report 'Registration Status by Scheduled Offering' is highlighted with a callout '3'. Other reports include 'Approvals Status Reports' and 'Self-Registration/Withdraw'.

- 4 Modify the report title if necessary.
- 5 Enter a report header and footer to add to the report.
- 6 Select a report destination from the drop-down menu.
- 7 Select a report format from the drop-down menu.
- 8 Click the filter icon to search for and select the scheduled offering(s) to run this report.
- 9 Click to mask or unmask Learner IDs on the report.
- 10 Click Save Report.

[Browse](#) | [Help](#)

> Run Report

Run Registration Status by Scheduled Offering

Report Title: 4

Report Header: 5

Report Footer:

Report Destination: 6

Report Format: 7

Mask Learner IDs 9

Page Break Between Records

Case sensitive search: Yes No

Scheduled Offering: (1000) 8

Learner: 8

Company:

From Learning Event Date: (MM/DD/YYYY)

To Learning Event Date: (MM/DD/YYYY)

Registration Status: Enrolled
 Waitlisted
 Cancelled
 Pending

10

- 11 Enter an ID for the saved report.
- 12 Enter a description of the saved report.
- 13 Click Submit.

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> Run Report > Save Report

Save Report

* = Required Fields

* Saved Report ID: 11

Description: 12

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The saved report displays on the **Saved Reports** tab.

14 To run a saved report, click the **Run** icon (📄➡) in the Actions column.

Saved Reports
Reports
Report Jobs
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5 Saved Reports

Category	ID	Title	Description	Actions
(none)	(none)	(none)	(none)	
Learner Management	LDC_LEARNERS_COMPLETED_ONLINE	Online Item Status (CSV)	LDC - learners in HQ domain who have completions in 2012	📄➡
Learner Management	SMITCH_ONLINE_STATUS	Online Item Status	LDC - Online Status for C-jsmitche4 with complete and incomplete	📄➡
Miscellaneous	LDC_CONTRACTOR_LATE	Incomplete Training Archived (CSV)	LDC - Contractors who have not completed training	📄➡
Miscellaneous	LDC_CURR_STATUS_NASA-ANNUAL-US	Learner Curriculum Item Status	LDC - Curriculum Status for all users, NASA-ANNUAL-USERRA-TRAINING	📄➡
Miscellaneous	Reg-STAT-SO	Registration Status by Scheduled Offering	Registration Status By SO	📄➡ 14