Edge Administrative Job Aid:
Running Compliance Reports

Managers, educators, administrators and delegates can run reports in Edge to view their staff's compliance on specific courses. There are several ways in which you can do this, depending on the information you need and how you would like it to be displayed. This job aid will go through all of the options available to you.

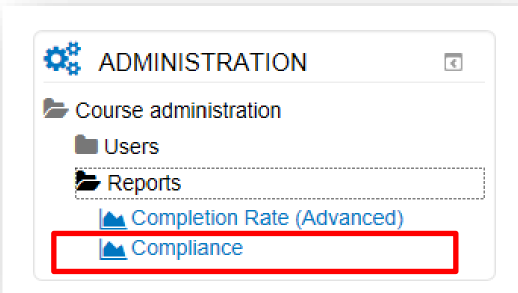
A summary of each compliance report can be found below, and detailed instructions can be found on subsequent pages.

Report Name	Description	Location of Report	Instructions
***Compliance** (one course)	Shows each of your staff member's compliance on a specific course	1) Go to the Course Catalogue and select the course 2) On the left under > Administration > Course Administration > Reports >Compliance	Page 2
***Staff Compliance Report** (all courses)	Shows each of your staff member's compliance on all of the courses that have been assigned to them	Under the "My Team" tab in the top menu bar	Page 3
Staff Completed Courses	Shows all of the courses that have been completed by your staff, whether the course was assigned to them or not. It only shows the courses that were completed; it does not show courses that were not completed	Under the "My Team" tab in the top menu bar	Page 4
Completion Rate (Advanced)	Shows a compliance summary percentage by department or manager for a particular course For example, VPs could view the compliance rate for the staff under each manager in their portfolio; or managers could view the compliance rate for each of their departments	3) Go to the Course Catalogue and select the course 4) On the left under > Administration > Course Administration > Reports >Completion Rate (Advanced)	Page 5
Compliance Comparison	Shows the compliance rate (%) for your team as compared to the overall compliance rate for GRH for each course that has been assigned to your staff	Under the "My Team" tab in the top menu bar	Page 6

*For most people, the **Compliance** or **Staff Compliance Report** will be the most useful

Compliance

To access this report, go to the Course Catalogue and select the course you are interested in.
Scroll down and look to the far left of your screen.
The report is found under Administration > Course Administration > Reports > Compliance



Note: If you have a blue bar along the left of your screen, you will need to click on the arrow icon at the bottom to display the Administration menu

This report shows each of your staff member's compliance on a specific course. It is likely going to be one of the more useful reports for most people.

Using the filter option of "contains" will give you the option to pull more information.

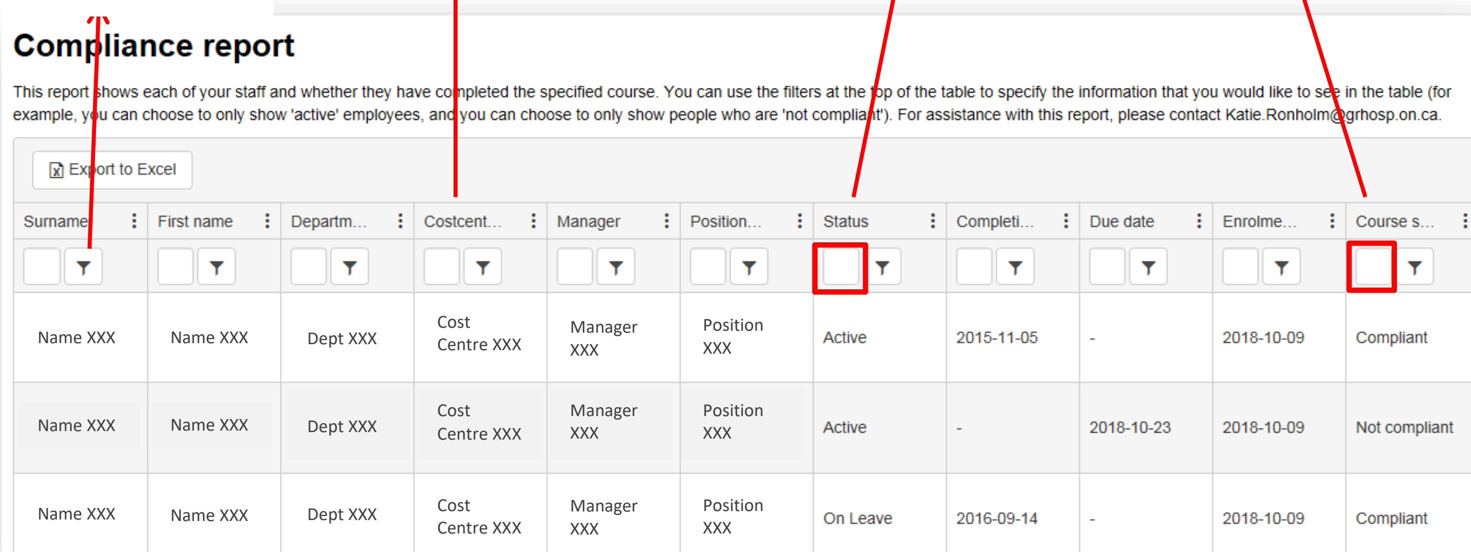
Use the filters to select the info that you want to see:

Click on the filter icon to change the option to "contains"

Click on any of the column headings to arrange that column in alphabetical order

Type "active" here to only show only the active employees (excludes leaves)

Type "not compliant" here to only show only the people that are not compliant



Compliance report

This report shows each of your staff and whether they have completed the specified course. You can use the filters at the top of the table to specify the information that you would like to see in the table (for example, you can choose to only show 'active' employees, and you can choose to only show people who are 'not compliant'). For assistance with this report, please contact Katie.Ronholm@grhosp.on.ca.

Export to Excel

Surname	First name	Departm...	Costcent...	Manager	Position...	Status	Completi...	Due date	Enrolme...	Course s...
Name XXX	Name XXX	Dept XXX	Cost Centre XXX	Manager XXX	Position XXX	Active	2015-11-05	-	2018-10-09	Compliant
Name XXX	Name XXX	Dept XXX	Cost Centre XXX	Manager XXX	Position XXX	Active	-	2018-10-23	2018-10-09	Not compliant
Name XXX	Name XXX	Dept XXX	Cost Centre XXX	Manager XXX	Position XXX	On Leave	2016-09-14	-	2018-10-09	Compliant

Note: To email a report to someone, try copying and pasting the URL link into an email instead of attaching it as an excel file. This way, the person can simply click on the link and will be brought right to the report page in Edge and will be able to view the data in real time, whereas excel files can become out of date very quickly.

Staff Compliance Report

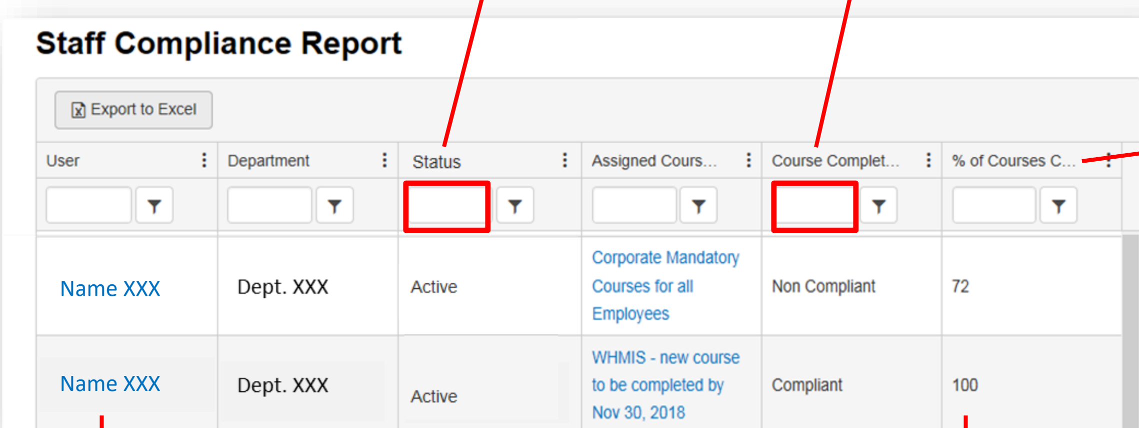
Found under the “My Team” tab in the top menu bar:

This report will most likely be the one that you use most often. It shows each of your staff member’s compliance on all of the courses that have been assigned to them.

Use the filters to select the info that you want to see:

Type “active” here to only show only the active employees (excludes leaves)

Type “non compliant” here to only show only the people that are not compliant



Click on the column headings to arrange the column in alphabetical order

Click on the person’s name to see which courses were not complete

Some courses are assigned as ‘bundles’ and some are assigned individually

Indicates the % of courses that are completed in that ‘bundle’

E.g. 8 courses completed out of 11 courses assigned in the bundle = 72%

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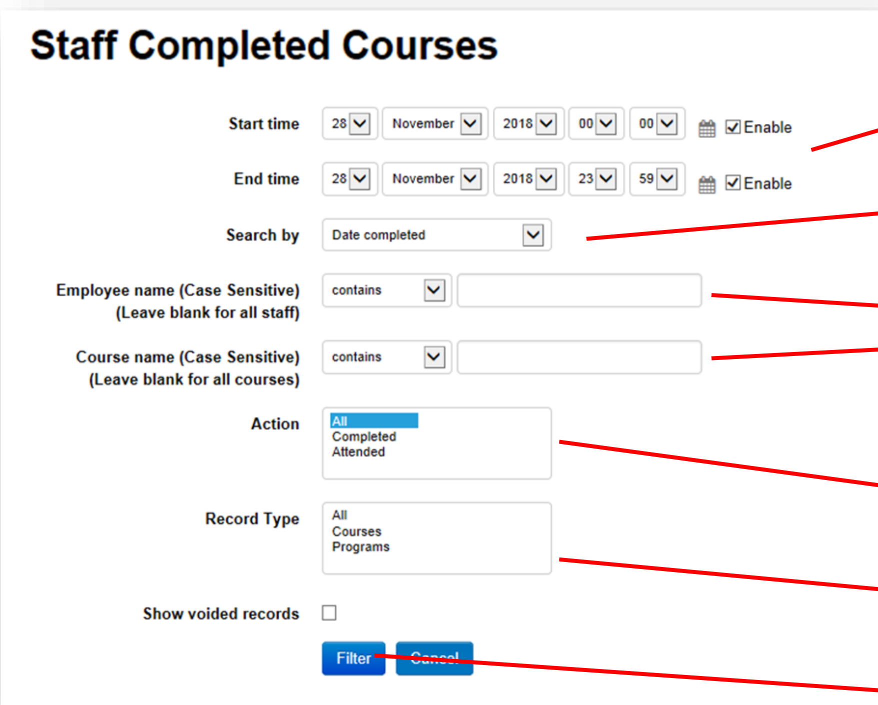
Staff Completed Courses

Found under the "My Team" tab in the top menu bar:

This report will likely be the one that you use the least. It shows all of the courses that have been completed by your staff, whether the course was assigned to them or not. However, it only shows the courses that were completed; it does not show courses that were not completed.

As such, this report is not recommended for checking staff compliance on mandatory training requirements. Instead, it may be used to view courses that an employee has chosen to complete on their own, without being assigned.



Select the date range, or un-check the boxes to include all dates

Leave as is

You can search for specific employees or courses by including that information here. Note that it is CASE SENSITIVE.

Leave as is

Select "Courses"

Click "Filter" to display the data

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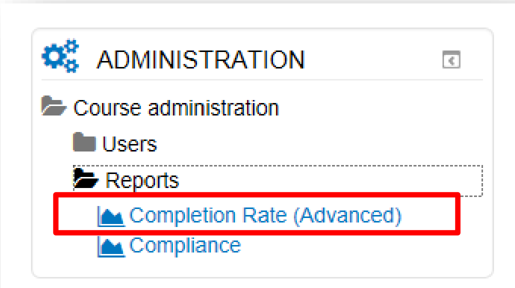
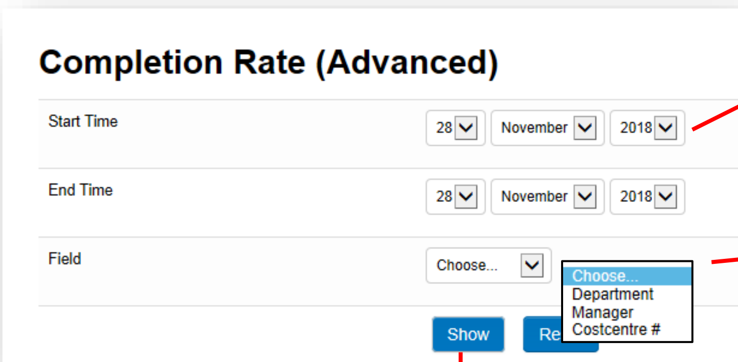
Completion Rate (Advanced)

To access this report, go to the Course Catalogue and select the course you are interested in.
Scroll down and look to the far left of your screen.
The report is found under Administration > Course Administration > Reports



Note: If you have a blue bar along the left of your screen, you will need to click on the arrow icon at the bottom of it to display the Administration menu

This report will show the compliance percentage for a particular course. You can choose to display the information by manager, by department or by cost center #.



Select the date range.
To show everything, change the 'start date' to a year far in the past (e.g. 2001), and keep the 'end date' as is

Choose the field that you want to display the information by.

Click "Show" to display the report

If you choose department, the report will look something like the below (If you choose manager or cost centre instead, the report will display that information in the first column instead of department):

Department	Complete	Incomplete	Percentage (%)
Childbirth	102	17	85.71
ENVIRONMENTAL SERVICES	101	13	88.6
In-Center Hemodialysis	101	2	98.06
Emergency	100	33	75.19

Note: This report does NOT include people who are on a leave of absence

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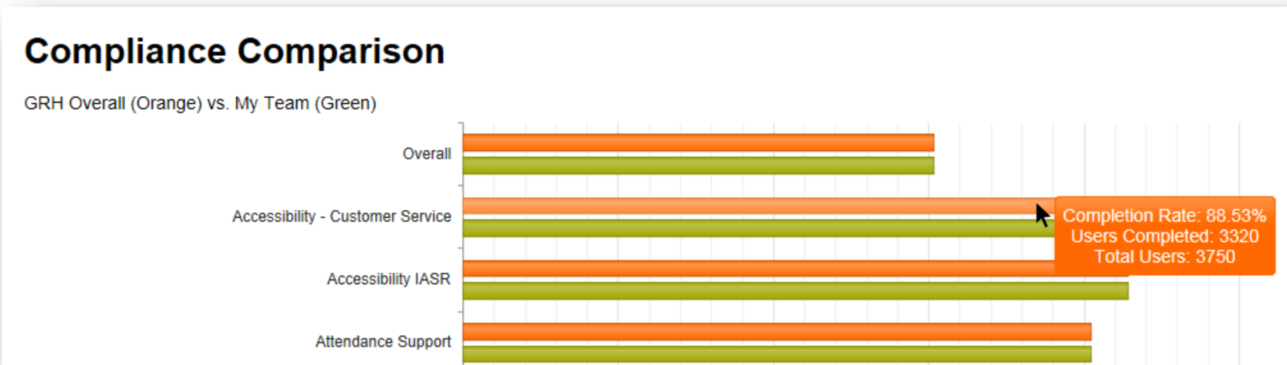
Compliance Comparison

Found under the “My Team” tab in the top menu bar:

Shows a bar graph of the compliance rate (%) for your team (green) as compared to the overall compliance rate for GRH (orange) for each course that has been assigned to your staff.

You can hover over each bar to see the related values.



*Note that this report includes people who are on a leave.