**COLUMBIA | ELM**
Enterprise Learning Management

## How to Run Reports as an Organization Manager

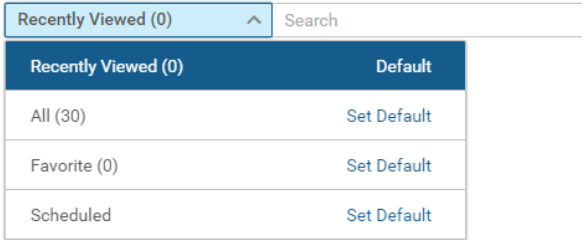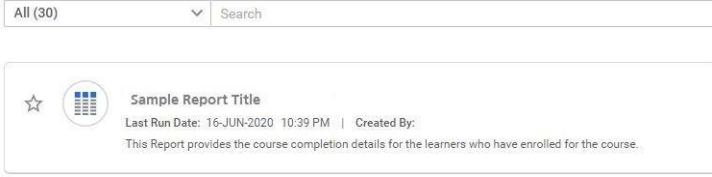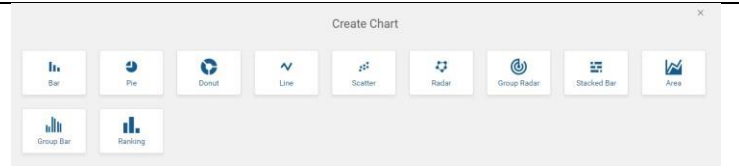The **My Team** page provides quick access to common tasks that summarize information about your team. It is accessible to people assigned as a manager in ELM (those who have direct reports) *and* is available to individuals designated as an organization manager for his or her school/department.

Analytics are available via the **My Team** page. There are certain reports that have been provided to you as an organization manager that you can run for your school/department.
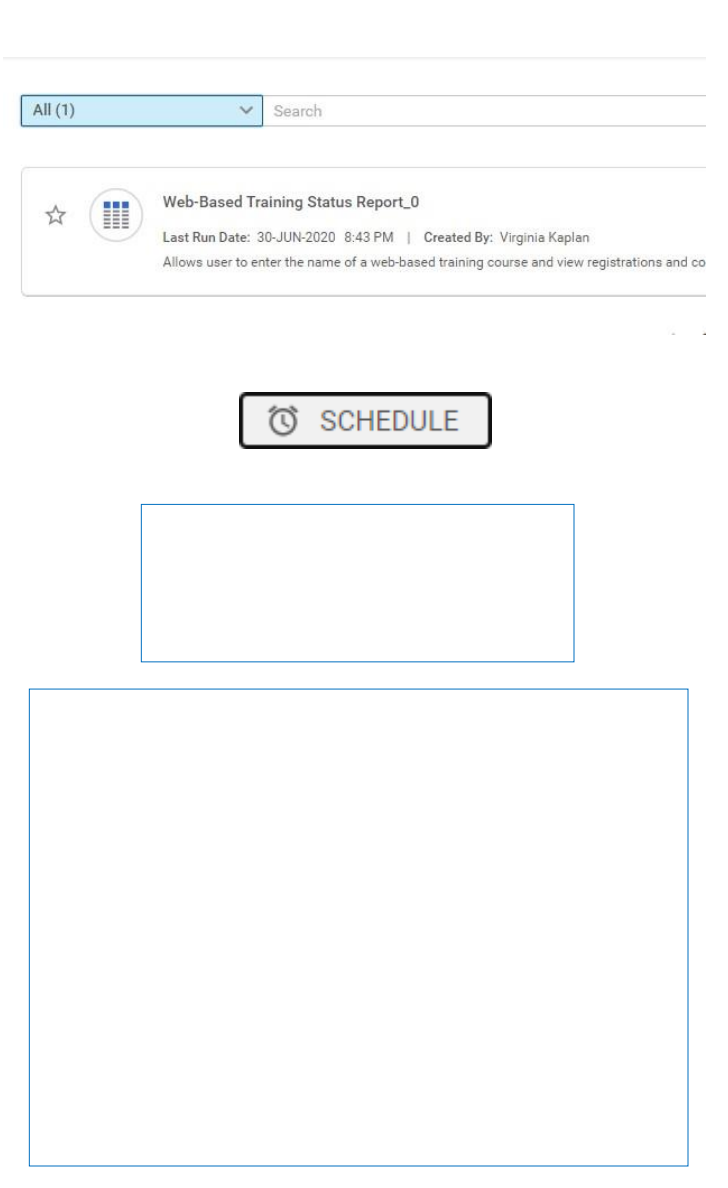
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| 1. Log in to ELM; navigate to **the menu on the top left** and click on My Team. | COLUMBIA \| ELM Enterprise Learning Management — Home / Me / My Team |
| 2. Using the navigation in the upper left corner of the "My Team" tab, select the analytics icon. | COLUMBIA \| ELM Enterprise Learning Management / My Team / BACK \| Learning & Certifications / Direct Team / NAME |
| 3. Once on the Analytics tab, click the arrow next to "Recently Viewed" on the search bar, and select "All." <br><br> *Note: You can click "Set Default" to keep this as your default view when you navigate to the page.* | Recently Viewed (0) — Search / Recently Viewed (0) — Default / All (30) — Set Default / Favorite (0) — Set Default / Scheduled — Set Default |
| 4. Search for the report you want to run. <br> a. To run the report, simply click anywhere in the box for that report (it will highlight in blue). | All (30) — Search / ☆ Sample Report Title / Last Run Date: 16-JUN-2020 10:39 PM \| Created By: / This Report provides the course completion details for the learners who have enrolled for the course. |
| 5. Once the report has run, click the down arrow in the upper-right corner to download it to PDF, Excel or CSV. | C ↓ + CREATE CHART |

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| 6.Some reports give you the ability to create a custom chart. Click the "Create Chart" and then select the chart type you wish to use and complete the required fields | Create Chart ☓<br><br>Bar  Pie  Donut  Line  Scatter  Radar  Group Radar  Stacked Bar  Area<br><br>Group Bar  Ranking |
| 7. You may also choose to schedule the report to run and be sent, via email, to yourself or others<br><br>    a. From the main report listing page, click the "Schedule" button to the right of the report name<br>    b. Then Click " "Add New Schedule" on the pop-up window<br>    c. Complete the parameters for your scheduled report and then click "Save."<br><br>*Report parameters include:*<br><br>***Schedule tab***<br><br>• *frequency – how often you want the report to run automatically*<br>• *report format – PDF, Excel, or CSV*<br>• *Recipient – enter one or more email addresses to whom you want to send the report*<br>• *Subject and Body – you can customize the email that will be sent along with the completed report*<br><br>***Filters tab***<br><br>• *If the report has filters that can be changed, for example the title of the course you are running a report on, you can change that on the Filters tab. Filters will vary by report.* | All (1) ▾  Search<br><br>☆  ▦  Web-Based Training Status Report_0<br>    Last Run Date: 30-JUN-2020  8:43 PM  \|  Created By: Virginia Kaplan<br>    Allows user to enter the name of a web-based training course and view registrations and co<br><br>⏰ SCHEDULE |