Locating and Accessing Merchant Manager Reports

Overview

The BuckeyeLearn Operations Team has created and shared custom reports for compliance and broad university initiative-oriented training. Merchant Managers (MM) now have a role that allows the viewing of these shared reports. MMs will see only those with whom they share a college appointment. In BuckeyeLearn terminology a *college* is referred to as a *division*. For example, if an MM is in the Academic Affairs division, the MM will see data for only those in Academic Affairs. The MM will not see data for anyone in the Business and Finance division. The MM report viewing role is constrained to the college (division) in which the MM resides in PeopleSoft data.

However, BuckeyeLearn is structured such that each user account may have up to three appointments. Because of this, a user may be present on three different unit's reports if the user has three distinctive appointments.

Some Merchant Managers may also be Security Liaison or have other reporting roles. This will likely mean that those individuals will have additional reports available to them.

Goals and Intent

- Provide a single-source, consistent view of *Complete* and *In Progress* transcript status. The custom reports are not intended (and cannot) tell an MM who hasn't taken the training. To be on the custom report, a user must have the training on their transcript by having requested it, or having had it assigned to them.
- Avoid numerous, highly customized reports from being created and shared within the system. BuckeyeLearn has robust and complex reporting capability. By collaborating with the compliance and initiative owners, the BuckeyeLearn Operations Team can leverage their system expertise to provide the correct data.
- Provide a role that is constrained by unit. There is one report per compliance item/initiative. It is only the view of the report that is constrained. This also provides a level of consistency across all MMs with access. The reports are summarized by Department, so you can view only the department or departments for which you are responsible.
- Provide a report that can be downloaded into Excel. These reports may be downloaded such that they can be sorted, charted, and pivot tables added as needed. These reports can also be distributed by the MM.

Contents

Access BuckeyeLearn

To access BuckeyeLearn:
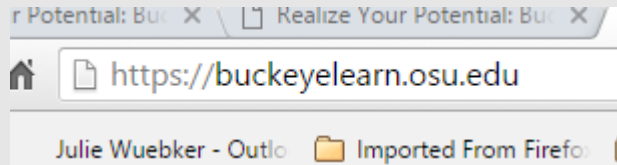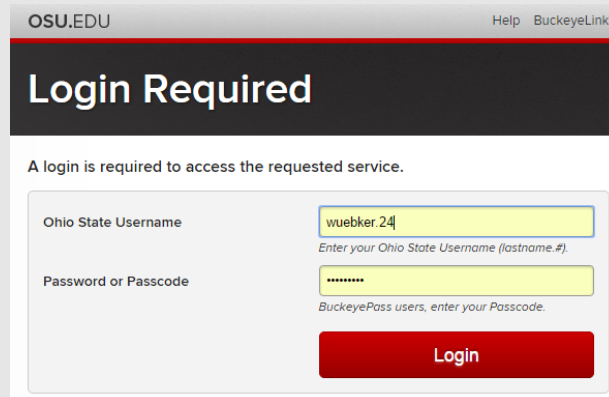
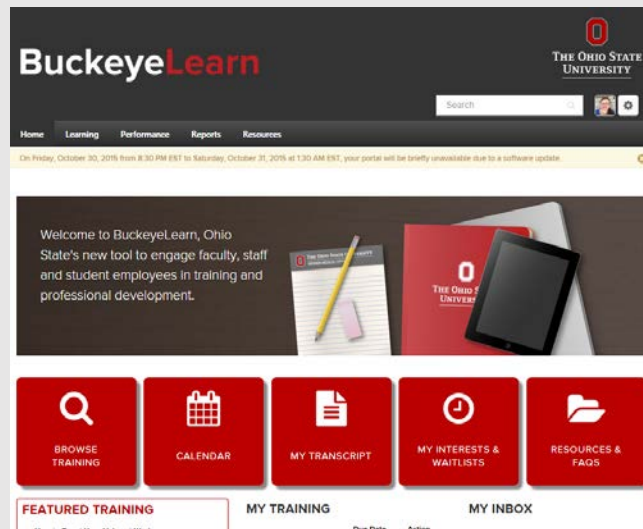1. Go to https://buckeyelearn.osu.edu in your browser

2. Observe that you will either be
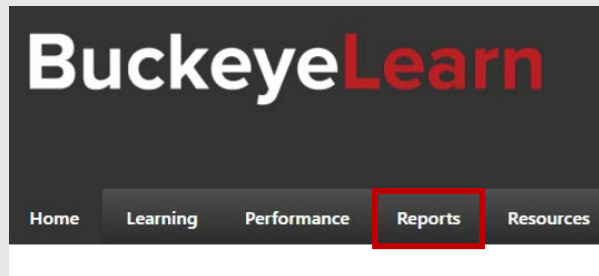   a. Directed to login using your name.# or Med Center ID

   OR

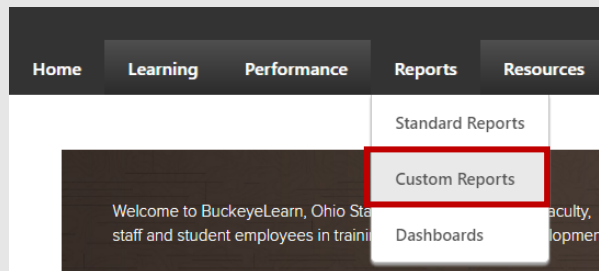   b. Arrive on the BuckeyeLearn *Welcome Page* (if you are already logged in via single sign on)

Locate Custom Reports

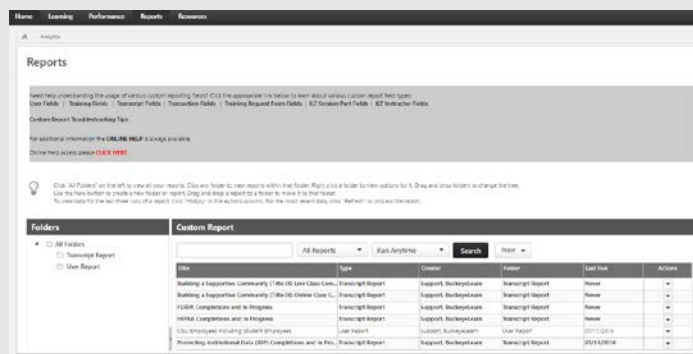To locate the *Custom Reports* section:

1. Locate the *Reports* tab

2. Place the mouse pointer over *Reports*, and click on *Custom Reports*.

3. Observe that the *Custom Reports* page opens.

    From here, you can refresh, download, and view reports.

Refresh and View a Custom Report

To view a custom report in BuckeyeLearn:

1. Locate the report you wish to view

2. Click the down-arrow in the *Actions* section

If you have never run the report, your only option will be to *Refresh*. *Refresh* will pull the latest data. If you have run the report before, you will see other options:
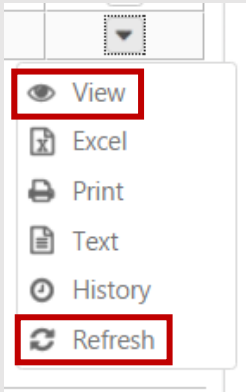
If you do not see the *View* option, it is likely that the report is too large to be viewed in the BuckeyeLearn interface, so *Excel* will be the best option. The *Excel* option will allow you to download the report to your computer.

3. Click *Refresh* (for this example)

4. Observe that the report is Processing

Last Run	Actions
Processing...	▼
Never	▼

When done, a date will appear

Last Run	Actions
07/11/2016	▼
Never	▼

5. Click the down-arrow and choose how you wish to review the report.
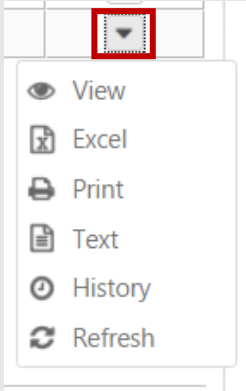
6. Click *View* (for this example)
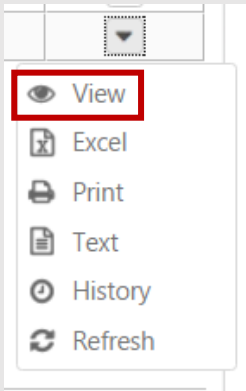
7. Observe that the report loads into BuckeyeLearn

Remember: An MM can view only departments and individuals who have an appointment in their own unit.

From this view, you can remove fields, view *Complete* and *In Progress* by department, download, and print the report.

Download a Custom Report (Excel)

To view a custom report as an Excel file:

1. Locate the report you wish to view

Title	Type	Creator	Folder	Last Run	Actions
Building a Supportive Community (Title IX) Live Clas...	Transcrip...	Support, BuckeyeLea...	Transcript Report	Never	▼
Building a Supportive Community (Title IX) Online C...	Transcrip...	Support, BuckeyeLea...	Transcript Report	Never	▼

2. Click the down-arrow in the Actions section
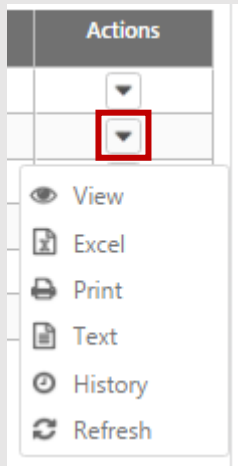
3. Click *Excel*
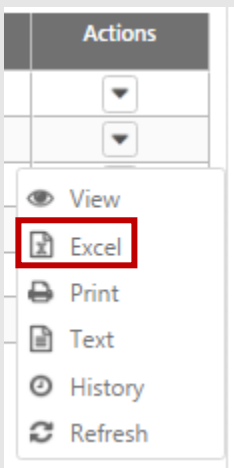
4. Type a name and choose a location for the Excel file
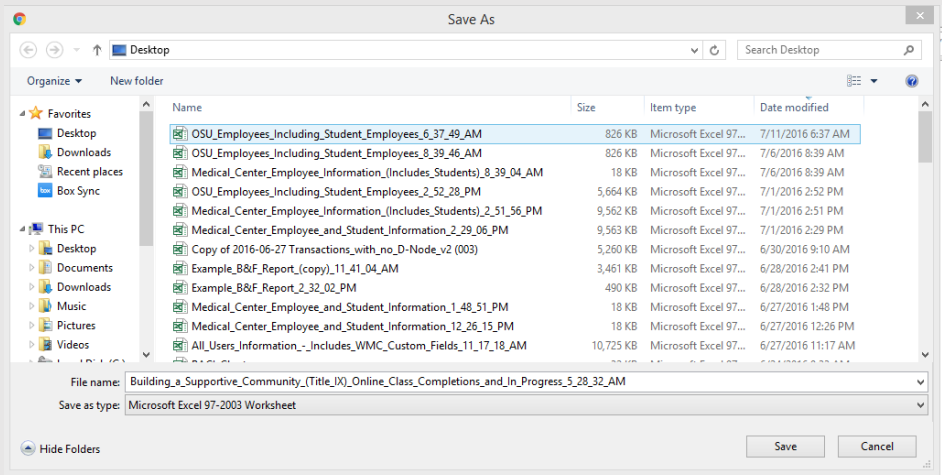
5.   Open the Excel file from where you saved it

From here you can remove the headers, sort, create pivot tables, remove data, and any other action that will make this report more valuable to you or to those with whom you will be sharing the report.