

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.

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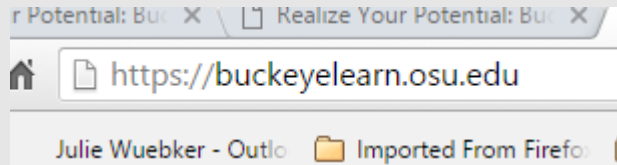
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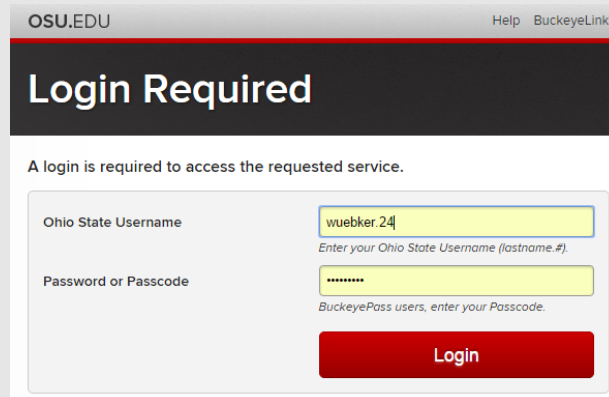
Access BuckeyeLearn

To access BuckeyeLearn:

1. Go to <https://buckeyelearn.osu.edu> in your browser

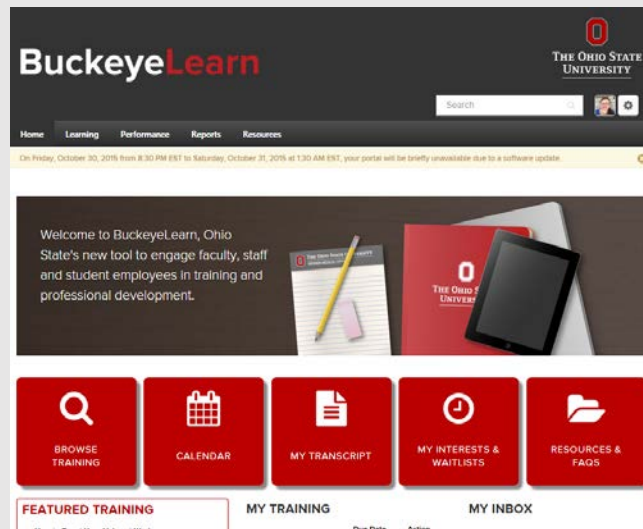


2. Observe that you will either be
 - a. Directed to login using your name.# or Med Center ID



OR

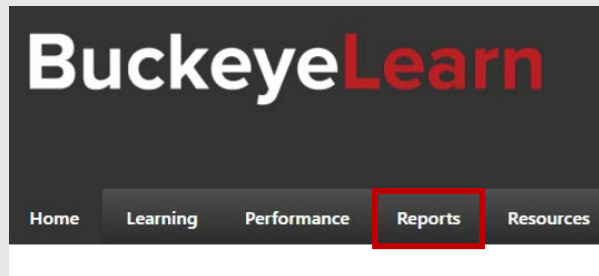
- b. Arrive on the BuckeyeLearn Welcome Page (if you are already logged in via single sign on)



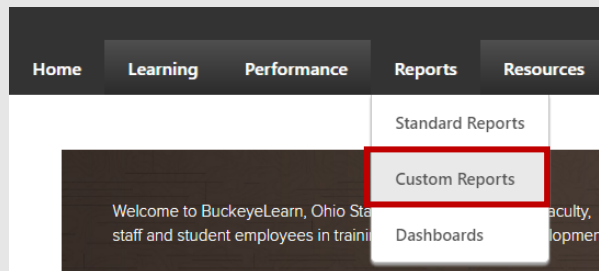
Locate Custom Reports

To locate the *Custom Reports* section:

1. Locate the *Reports* tab

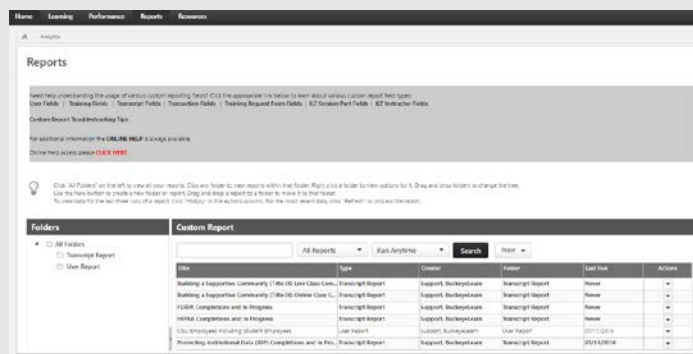


2. Place the mouse pointer over *Reports*, and click on *Custom Reports*.



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

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



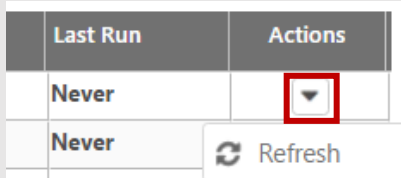
Refresh and View a Custom Report

To view a custom report in BuckeyeLearn:

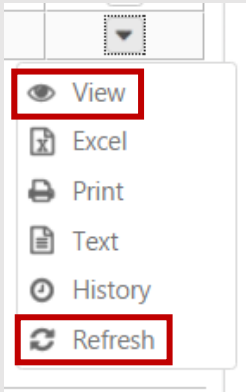
1. Locate the report you wish to view

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



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.

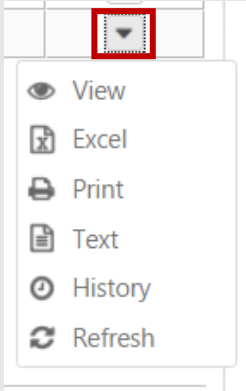
3. Click *Refresh* (for this example)
4. Observe that the report is Processing

Last Run	Actions
Processing...	▼
Never	▼

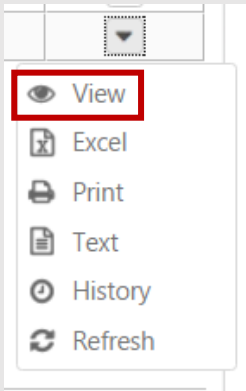
When done, a date will appear

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



Building a Supportive Community (Title IX) Online Class Completions and In Progress

Report Information

Fields Displayed:
 User Last Name User First Name User Login User Manager Name User Manager Email Training Title Training Provider Transcript Status Transcript Completion Date Division 1 Department ID 1 Job Code 1 Employee Type 1 Division 2 Department ID 2 Job Code 2 Employee Type 2 Division 3 Department ID 3 Job Code 3 Employee Type 3

Filters Applied:
User ID does not contain admin
User Status is equal to Active
Training Title contains Building a Supportive Community
Training Type is equal to Online Class

Report Results

Actions  

Department ID 1	User Last Name	User First Name	User Login	User Manager Name	User Manager Email	Training Title	Training Provider	Transcript Status	Transcript Completion Date
▼ A.A.M.R.C. (1)									
▼ Academic Affairs Admin (10)									
▼ ADA Coordinator (1)									
▼ Air Force Aerospace Studies (3)									
▼ BPCRC Research Commitments (1)									
▼ Byrd Polar & Climate Resrch Cntr (27)									
▼ Campus Microscopy & Imaging (1)									
▼ Center for Emergent Materials (4)									
▼ Center/Lake Erie Area Research (32)									
▼ Chemical Instrumentation Ctr (11)									
▼ Civil, Envir & Geod Eng (1)									
▼ College of Nursing (1)									

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.

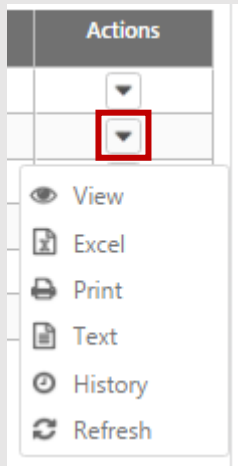
Download a Custom Report (Excel)

To view a custom report as an Excel file:

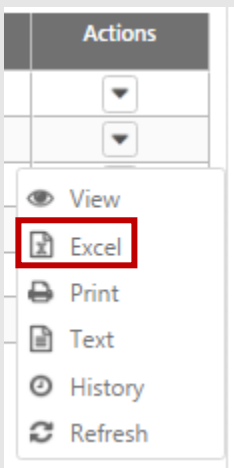
1. Locate the report you wish to view

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	▼

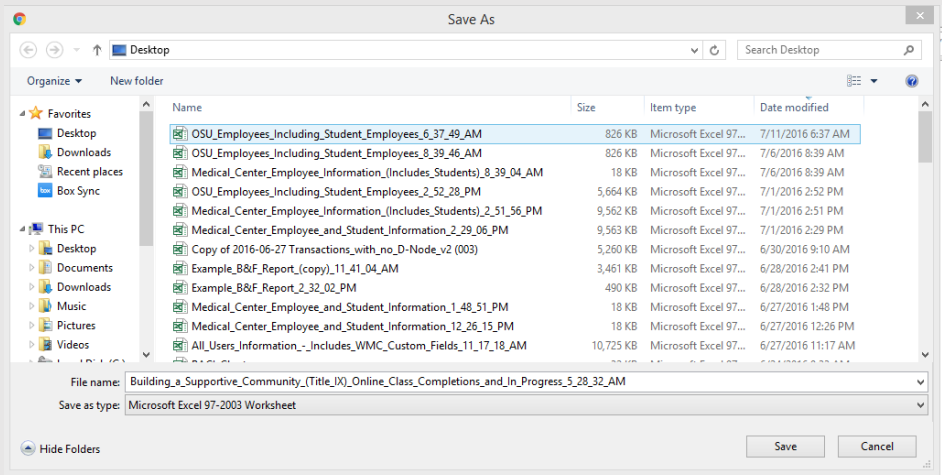
2. Click the down-arrow in the Actions section



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

The screenshot shows an Excel spreadsheet titled "OSU_Employees_Including_Student_Employees_6_37_49_AM [Protected View] - Excel". The spreadsheet is in Protected View. The data is organized into two main sections: report metadata and a list of employees.

	A	B	C	D	E	F	G	H	
1	Title:	OSU Employees Including Student Employees							
2	Report Generated By:	Wuebker, Julie							
3	Report Date/Time:	07/11/2016 06:36 AM							
4	Record Count:	4191							
5	Record Count Limit:	200000							
6	Filters:	[User ID] does not contain admin							
7		[User Status] is equal to Active							
8									
9	User Last Name	User First Name	User Login	User Status	User Manager Name	Employee Type 1	Employee Type 2	Employee Type 3	Divis
10	Abreu	Isis	abreu.23	Active	Cornute, Tai	Student			Offic
11	Anthony	Marcus	anthony.228	Active	Cornute, Tai	Student			Offic
12	Clardy	Cametreus	clardy.14	Active	Cornute, Tai	Student			Offic
13	Diabate	Mariame	diabate.1	Active	Bennett, Robert	Student			Offic
14	Diaz	Nashalie	diaz.221	Active		Student			Offic
15	Edzie	Louisa	edzie.1	Active		Student			Offic
16	Fernandez	Estefania	fernandez.240	Active		Student			Offic
17	Hammond	Nii Armah	hammond.350	Active	Cornute, Tai	Student			Offic
18	Pannell	Alexis	pannell.42	Active	Cornute, Tai	Student			Offic
19	Prince	Princess	prince.180	Active	Cornute, Tai	Student			Offic
20	Teague	Lexas	teague.63	Active	Cornute, Tai	Student	Student		Offic
21	Williams	Tueri	williams.4295	Active	Cornute, Tai	Student	Student		Offic
22	Asher	Herbert	asher.1	Active	Harris, Bradley	Faculty			Offic
23	Barr	Terrence	barr.280	Active	Cowley, Jennifer	Student			Offic
24	Baugher	Hallie	baugher.16	Active		Student			Offic
25	Baumer	Elmer	baumer.1	Active		Unclassified	Faculty		Offic
26	Beale	Taylor	beale.33	Active		Unclassified			Offic
27	Boehm	Michael	boehm.1	Active	Drake, Michael	Faculty	Faculty		Offic
28	Borders	Marqaret	borders.52	Active	Lieb, Joan	Student			Offic

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.