

# Learning Zone Guide: How to Run Management Reports (MHA Managers)

This guide provides instructions on how to run management reports within the Learning Zone system for all MHA managers and other operational colleagues who take on the responsibility of booking training for their colleagues.

### Please Note the Saved Reports option is not currently in use.

This guide will cover the following areas;

- 1. How to run compliance training reports
- 2. How to run other reports
- 3. Using the Groups screen

### **1. How to run compliance reports**

- People Development have worked closely with the Learning Zone system provider to create a bespoke compliance report that is like that which many of you used to use within the old MHA Training matrix system. We recognised that this report has been missed by many of our management colleagues.
- 2. This report is called the **Predefined compliance RAG** report and we feel that this will be the report that you are likely to gain the most benefit from in monitoring compliance training levels







Reports		3.	The Reports screen will be displayed
Training Reports Saved reports Groups		4.	The reports are split into sections and
Group manager User progress reports	Summary reports		these other reports will be covered
Individual user reports	Course reports summary		later in this document
Gei useng recours by user	Course competitoris summary ge	5.	This section is going to focus on the
Course completions ()	Compliance summay report		Predefined Compliance RAG report
Predefined Compliance RAG 🕢 Course deadlines RAG 🕢			which can be found under <b>User</b>
Face-to-face session activities ()			Progress Reports – Course Reports
Compliance by user Compliance RAG			by User
		6.	Click on the <b>Predefined compliance</b>
			RAG report



redefined compliance RAGo		7. In thi
Training Reports Saved reports Groups		top a
Group	Autogroup for Location: Kenbrook	8 This
Courses	A Guide to Safe Food Handling (Regulatory)	0. 1110
	Adult Support and Protection - Scotland (Regulatory)	
	Adults with Incapacity - Scotland (Regulatory)	optio
	Anti-Bribery (MHA Mandatory) Appropriate Lise of Bedrails (MHA Mandatory)	
	ARCO (Associated Retirement Community Operators) Programme (MHA Mandatory)	want
	Asbestos for Managers and Maintenance (Statutory)	want
	Autism Awareness (Regulatory)	
	Boots: Care of Medicines Advanced (Regulatory)	9. Wha
	Boots: Care of Medicines Foundation (Regulatory) Rests: Datiant Dark Dispansional including Safe Handling of Medicines (Regulatory)	•••••••
	Central Support Induction (MHA Mandaton)	م بابداد
	Confidentiality and Information Handling - Volunteers (Statutory)	drive
	Confidentiality and Information Handling (Statutory)	
	Cyber Security Awareness (MHA Mandatory)	10 Ear (
	De-escalation Management and Intervention (Regulatory)	
	Dementia Friends - Volunteers (MHA Mandatory)	
	Dementia: An introduction (WHA Mandatory) Dentitiation of linetry Safety and (2013) (Statuton)	
	Documenting in a Care Environment (MHA Mandatory)	•
	Duty of Candour - Scotland (Regulatory)	
	Dysphagia: Awareness and Support of Swallowing Difficulties (MHA Mandatory)	
	Equality & Diversity (Statutory)	
	Falls: Balancing Risk (MHA Mandatory)	
	Falls: Minimising the Risk (MHA Mandatory)	
	Final Lap (MHA Mandatory)	
	rine Awareness (Sadudry) Fire Evacuation Drill - Site Specific (MHA Mandatory)	
	Fire Evacuation Safety (Statutory)	
	Fire Safety and Emergency Response (Statutory)	
	Fire Safety: A Practical Approach - Volunteers (Statutory)	
	Fire Safety: A Practical Approach (Statutory)	
	First Aid and Basic Life Support (Statutory)	
	Final And, Awareness and the basic Principles - Volunteers (statutory) Food Safety & Hygiene (Level 2) (Statutory)	•
	rood servy of hygrene (Lever 2) (statutory)	•

- In this next screen you will see at the top a Group drop down
- This drop down will contain various options for you to select for who you want to run this report for.
- What is contained in this drop down is driven by your job role

10. For example;

- An Area Manager will have the option to run the report on their entire area or any individual home or scheme within that area
- An Admin Manager will have the option to run the report for all their direct reports or for their entire location (this would then include the Deputy and Home Manager)

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		11. All the courses listed on the screen
		are all the current compliance courses
		provided at MHA and these are
		predefined by the system and cannot
		be changed
<ul> <li>Advanced settings</li> </ul>		12. At the bottom of the screen there is
Initial course deadline date	Display initial course deadline date for new users if not accredited	
Ignore new users	□ Ignore new users in non-compliance data if the user is still inside the initial course deadline period	an option called Advanced Settings
Live data	□ Run the report on live data 🕜	13. Click on this to open up the options
User status	Active users •	
Parental/adoption leave	Exclude parental/adoption leave users on reports	snown nere
Sick Leave	Exclude sick leave users on reports	14. Below is an overview of each of these
Temporary Staff	Exclude temporary staff on reports	ontions
	Download to Excel	ομιστις

- Initial course deadline data for new users if not accredited if ticked this option will provide the deadline dates that courses need to be completed by for any new starters displayed on the report, if not you will see the courses new starters need to do but the completion required date will be missing – it is recommended that this is ticked
- NOTE\* DO NOT CLICK THIS OPTION (Once the initial enrolment period for all imported data has passed we will
  communicate when this option is available to use) Ignore new users in non-compliance data if the user is still
  inside the initial course deadline period if ticked the report will not include any new starters who have not reached
  their initial completion deadline date for a course in the overall compliance percentages on the report



- Run the report on live data Leaving this box unticked will assist reports in running more quickly as they are based on the previous days data. If you want up to the minute live data tick this box.
- User Status this drop down allows you to select whether you want to see data in your report for Active users, Suspended users or Active and suspended users
- Exclude parental /adoption leave users on reports tick this box to exclude any users who are recorded on iTrent as being on parental / adoption leave, unticking the box will then display these users
- Exclude sick leavers on reports tick this box to exclude any users who are recorded on iTrent as being on long term sick leave, unticking the box will then display these users
- Exclude temporary staff on reports tick this box to exclude any users who are recorded on iTrent as being bank staff, unticking the box will then display these users

<ul> <li>Advanced settings</li> </ul>		15. To run the report click <b>Download to</b>
Initial course deadline date	Display initial course deadline date for new users if not accredited	
Ignore new users	Ignore new users in non-compliance data if the user is still inside the initial course deadline period	Excel
Live data	Run the report on live data	
User status	Active users 🗢	
Parental/adoption leave	Exclude parental/adoption leave users on reports	
Sick Leave	Exclude sick leave users on reports	
Temporary Staff	Exclude temporary staff on reports	
	Download to Excel	



							_				16. Your downloaded report will be
					RAC	5_report_2023xlsx	^				displayed at the bottom left-hand side
											of the screen
											17. Click on it to open the report
File Home	Insert Pa	age Layout Formulas Data	Review View	v Automate Hel	P						18. The report will then open in Excel
PC69	w <u>becaletor</u>		, onless you need t	to earc it's saler to stay in r	TOTELED YEW.						
BC00		10/12/2022									19 Click on the Enabling Editing option at
A B Group: Autogroup fr	C or Location: <	D E F	G H	I I	K L M	N O P Q	R S T U	V W	X Y Z	AA AB AC	
Users: 53		Compliant:	Future date / co	Future date	Future date						the ten of the core on in the vellow her
Total percentage co	mpliance for	all users across all enrolled courses	Expired / overd : 89%	ue c Not started							the top of the screen in the yellow bar.
Display initial course	e deadline da	ate for new users if not accredited: 1	fes								
Ignore new users in	non-complia	ance data if the user is still inside the	e initial course d	leadline period: Yes							
Parental/adoption I	eave: Not ind	luded									
Sick leave: Not inclu Tomporany staff: No	ided tincluded										
remporary starr. No	n menudeu										
Courses:										A Guide to Safe Food Hand	
Compliance period:										1095 day(s) period + 30 day	
Initial deadline for r	new staff:									Enrolment based: 12 week	
Usersen Circle		- Ferreil	14 Cuestian	UE Disentente	16 Dealers desertment	17.0000	to balato	Manager			
302240 Test	User	notexist@mbalearningzone.org.u	Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Home Manager	Test Manager	Test Home 66%		
315616 Test	User	notexist@mhalearningzone.org.	Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Deputy Home Manager	Test Manager	Test Home 52%		
317731 Test	User	notexist@mhalearningzone.org.u	Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Administration Manager	Test Manager	Test Home 83%		
324536 Test	User	notexist@mhalearningzone.org.	Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Senior Care Assistant	Test Manager	Test Home 73%		
11140 Test	User	notexist@mhalearningzone.org.u	Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Domestic Assistant	Test Manager	Test Home 54%		
10980 Test	User	notexist@mhalearningzone.org.	Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager	Test Home 85%		
303096 Test	User	notexist@mhalearningzone.org.	Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Laundry Assistant	Test Manager	Test Home 69%		
304245 Test	User	notexist@mhalearningzone.org.u	Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager	Test Home 90%		
307296 Test	User	notexist@mhalearningzone.org.	Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager	Test Home 85%		
310278 Test	User	notexist@mhalearningzone.org.u	Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Maintenance Worker	Test Manager	Test Home 65%		
317056 Test	User	notexist@mhalearningzone.org.u	Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Kitchen Assistant	Test Manager	Test Home 94%	10/08/2022	
317125 Test	User	notexist@mhalearningzone.org.	Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager	Test Home 85%	20/00/2022	
317569 Test	User	notexist@mhalearningzone.org.u	Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager	Test Home 0%		
318244 Test	User	notexist@mhalearningzone.org.	Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Maintenance Worker	Test Manager	Test Home 0%		
320808 Test	User	notexist@mhalearningzone.org.	Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager	Test Home 77%	15/11/2020	
320898 Test 321544 Test	User	notexist@mhalearningzone.org.	Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager	Test Home 75%		
321666 Test	User	notexist@mhalearningzone.org.	Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager	Test Home 85%		
322357 Test	User	notexist@mhalearningzone.org.u	Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Senior Care Assistant	Test Manager	Test Home 77%		
324127 Test	User	notexist@mhalearningzone.org.	Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager	Test Home 90%		
326544 Test	User	notexist@mhalearningzone.org.u	Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager	Test Home 85%		
327224 Test	User	notexist@mnalearningzone.org.0	Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	care Assistant	Test Manager	Test Home 80%		



- Group: Autogroup for Location: <b Colour ke Compliant Future date otal number of users fully compli Non-compliant Total percentage compliance for all users across all enrolled courses: 89% Display initial course deadline date for new users if not accredited: Yes Ignore new users in non-compliance data if the user is still inside the initial course deadline period: Ye ental/adoption leave: Not included Sick leave: Not included Temporary staff: Not included Courses: A Guide to Safe Food Hand Compliance pr 1095 day(s) period + 30 day Initial deadline for new staff Enrolment based: 12 weel L4 Function L5 Directorate L7 Area team me Lastname Email L6 Region department Job title Manager fullname L8 Volunt 302240 Test notexist@mhalearningzone.org.(Operations Care Homes Care Home Region 2 Care Homes Area - Test Home Manager Test Manager Test Home 66% User notexist@mhalearningzone.org.(Operations notexist@mhalearningzone.org.(Operations Care Home Region 2 Care Homes Area - Test Care Homes Area - Test Deputy Home Manager Test Manager Administration Manager Test Manager 315616 Test licar Care Homes Test Home 52% 317731 Test User Test Home 83% Care Homes **Care Home Region 2** 324536 Test liser notexist@mhalearningzone.org.(Operations Care Homes Care Home Region 2 Care Homes Area - Test Senior Care Assistant Test Manage Test Home 73% 11140 Test notexist@mhalearningzone.org.(Operations Care Homes Care Home Region Care Homes Area - Tes Domestic Assi Test Manager Test Home 54% 16980 Test User notexist@mhalearningzone.org.(Operations Care Homes Care Home Region 2 Care Homes Area - Test Senior Care Assistant Test Manager Test Home 85% Care Home Region 2 301947 Test User User notexist@mhalearningzone.org.(Operations notexist@mhalearningzone.org.(Operations Care Home Care Homes Area - Test Care Homes Area - Test Care Assistant Laundry Assistant Test Home 71% Test Manag 303096 Test Care Homes est Home 69% Care Home Region 2 Test Manager 304245 Test User notexist@mhalearningzone.org.(Operations Care Homes Care Home Region 2 Care Homes Area - Test Care Assistant Test Manage Test Home 90% 307296 Test Care Homes Area - Test notexist@mhalearningzone.org.(Operation Care Home: Care Home Region Care Assistant Test Manage Test Home 85% 310278 Test User notexist@mhalearningzone.org.(Operations Care Homes Care Home Region 2 Care Homes Area - Test Maintenance Wor Test Manage Test Home 65% Care Home Region 2 Care Assistant Kitchen Assistant 313779 Test Use notexist@mhalearningzone.org.(Operations Care Home Care Homes Area - Test Test Manag Test Home 75% 317056 Test User notexist@mhalearningzone.org.(Operations Care Homes Area - Test Test Home 94% Care Homes Care Home Region 2 Test Manager 317125 Test User notexist@mhalearningzone.org.(Operations Care Homes Care Home Region 2 Care Homes Area - Test Care Assistant Test Manage Test Home 85% 317569 Test User User notexist@mhalearningzone.org.(Operations Care Homes Care Home Region Care Homes Area - Test Care Assistant Test Manager Test Home 0% 318244 Test Test Home 0% notexist@mhalearningzone.org.(Operations Care Homes Care Home Region 2 Care Homes Area - Test Maintenance Worker Test Manager 320808 Test User notexist@mhalearningzone.org.(Operations Care Homes Care Home Region 2 Care Homes Area - Test Care Assistant Test Manage Test Home 77% Test Manager 320898 Test User notexist@mhalearningzone.org.(Operations Care Home Region 2 Care Homes Area - Test Care Assistant est Home 75% Care Homes 321544 Test User notexist@mhalearningzone.org.(Operations Care Homes Care Home Region 2 Care Homes Area - Test Care Assistant Test Manager Test Home 75% 321666 Test Use notexist@mhalearningzone.org. Operations Care Homes Care Home Region 2 Care Homes Area - Test Care Assistant Test Manage Test Home 85% 322357 Test User notexist@mhalearningzone.org.(Operations Care Homes Care Home Region 2 Care Homes Area - Test Senior Care Assistant Test Manager Test Home 77% notexist@mhalearningzone.org.(Operations notexist@mhalearningzone.org.(Operations 324127 Test User Care Homes Care Home Region 2 Care Homes Area - Test Care Assistant Test Manage Test Home 90% Care Home Region 2 Care Assistant Test Home 85% 326544 Test Care Homes Area - Tes Test Manager 327224 Test notexist@mhalearningzone.org.(Operations Care Homes Care Home Region 2 Care Homes Area - Test Care Assistan Test Manage Test Home 80%
- 20. You may find that the data all feels quite close together and you will need to extend the width of your columns to see the data more clearly
- 21. **NOTE:** People Development are running some sessions to help support the development of excel skills for this report, they are called Manual Manipulation of the RAG report, please book on one for support in this.

22. At the top of the report, you will see key information about what the report is showing you to include;

- The location the report is based on
- The number of users included in the report
- Total number of users that are showing as fully compliant in the report
- Total percentage compliance for all users across all enrolled courses enrolled courses are the courses that the Learning Zone has automatically enrolled colleague son based on their job role(s)
- Whether you have chosen to display the initial course deadline date for new users if not accredited



- Whether you have chosen to ignore new users in non-compliance data if the user is still inside the initial course deadline period
- Whether you have chosen to include parental/adoption leave, sick leave or temporary staff
- 23. There is then a Colour Key
  - Please Note: any cells that are shown in the report with no colour added against a user's name is a course that has not been allocated to them by the system and therefore is not a course they are required to complete
  - For colleagues that are compliant there are 3 possible colour options;
    - i. Green these fields are courses that the user is required to complete based on their job role(s) and will contain a future date when the course is required to be completed by for courses that refresh. For courses completed that are a one off it will display the word **Completed** followed by the date the course was completed
    - ii. Orange this shows that the user is in the 30-day refresh window and will provide the date that the course will become overdue if not completed before
    - iii. Grey this shows for users that are new and are still within the initial completion time period for that course
  - For colleagues that are non-compliant there are 2 possible colour options
    - i. Red these fields are courses that are expired and now overdue and will contain the words **Deadline overdue** followed by the date it became overdue
    - ii. Grey These are courses that have been assigned to users but have never been completed and therefore need to be completed as soon as possible



Courses:											
Compliand	ce period:										
Initial dea	dline for new	staff:									
Username	e Firstname	Lastname	Email L4 Function	L5 Directorate	L6 Region department	L7 Area team	Job title	Manager fullname	L8 Volunteerin	Location	Completion
3022	240 Test	User	notexist@mhalearningzone.org.(Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Home Manager	Test Manager		Test Home	66%
3150	616 Test	User	notexist@mhalearningzone.org.(Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Deputy Home Manager	Test Manager		Test Home	52%
317	731 Test	User	notexist@mhalearningzone.org.(Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Administration Manager	Test Manager		Test Home	83%
324	536 Test	User	notexist@mhalearningzone.org.(Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Senior Care Assistant	Test Manager		Test Home	73%
111	140 Test	User	notexist@mhalearningzone.org.(Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Domestic Assistant	Test Manager		Test Home	54%
169	980 Test	User	notexist@mhalearningzone.org. Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Senior Care Assistant	Test Manager		Test Home	85%
3019	947 Test	User	notexist@mhalearningzone.org.(Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home	71%
3030	096 Test	User	notexist@mhalearningzone.org. Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Laundry Assistant	Test Manager		Test Home	69%
3042	245 Test	User	notexist@mhalearningzone.org.(Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home	90%
3072	296 Test	User	notexist@mhalearningzone.org.(Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home	85%
3102	278 Test	User	notexist@mhalearningzone.org.(Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Maintenance Worker	Test Manager		Test Home	65%
313	779 Test	User	notexist@mhalearningzone.org. Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home	75%
3170	056 Test	User	notexist@mhalearningzone.org.(Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Kitchen Assistant	Test Manager		Test Home	94%
317:	125 Test	User	notexist@mhalearningzone.org.(Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home	85%
3175	569 Test	User	notexist@mhalearningzone.org.(Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home	0%
3182	244 Test	User	notexist@mhalearningzone.org.(Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Maintenance Worker	Test Manager		Test Home	0%
3208	808 Test	User	notexist@mhalearningzone.org.(Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home	77%
3208	898 Test	User	notexist@mhalearningzone.org.(Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home	75%
3215	544 Test	User	notexist@mhalearningzone.org.(Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home	75%
3210	666 Test	User	notexist@mhalearningzone.org. Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home	85%
3223	357 Test	User	notexist@mhalearningzone.org.(Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Senior Care Assistant	Test Manager		Test Home	77%
324	127 Test	User	notexist@mhalearningzone.org.(Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home	90%
3265	544 Test	User	notexist@mhalearningzone.org. Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home	85%
3272	224 Test	User	notexist@mhalearningzone.org.(Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home	80%
3274	433 Test	User	notexist@mhalearningzone.org. Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Chaplain	Test Manager		Test Home	90%
327	798 Test	User	notexist@mhalearningzone.org. Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home	0%
328	575 Test	User	notexist@mhalearningzone.org.(Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Laundry Assistant	Test Manager		Test Home	82%
3289	969 Test	User	notexist@mhalearningzone.org. Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Senior Care Assistant	Test Manager		Test Home	58%
3293	103 Test	User	notexist@mhalearningzone.org. Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home	90%
3298	846 Test	User	notexist@mhalearningzone.org.(Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Domestic Assistant	Test Manager		Test Home	93%

- 24. In the actual report data you will see the following data displayed
  - Username this will be the payroll number of any MHA staff and the email address of any volunteers
  - Firstname / Lastname as recorded in iTrent
  - Email this will be the email address that is stored for this person in iTrent and if it needs to be changed you will need to contact peoplesupport@mha.org.uk
  - L4 Function this will advise whether they work in Operations or Central Support



- L5 Directorate this will provide the directorate that they work in i.e. Care Homes, Retirement Living etc....
- L6 Region Department this will provide the Region or department that they work in i.e. Care Home Region 2, People Services etc..
- L7 Area team this is then the team that the user works in i.e. Care Homes Area West Midlands etc...
- Job title this will be the primary job title that they hold as recorded in iTrent
- Managers full name
- L8 volunteering this will contain the word Volunteer if the user is a volunteer and helps managers to easily identify volunteers
- Location this is the local team name for Central Support or the home / scheme for Operational colleagues
- Completion this is the percentage compliance that that user is across all the courses that they have been allocated
- The remaining columns all contain the names of each compliance course provided at MHA in alphabetical order as you move across the screen from left to right. This includes volunteers courses that all contain the word Volunteers in the title to distinguish them from staff courses i.e. **Confidentiality and Information Handling Volunteers (Statutory)**
- For each course you will be provided with the following information;
  - i. In the title you will be provided with whether the course is Statutory, Regulatory or MHA Mandatory
  - ii. Whether it is a one off course, which will be shown by the word **Permanent**
  - iii. If the course has a refresh timeframe you will be provided with the number of days between each refresh and the number of days provided in the refresh window i.e. 1095 day(s) period + 30 day(s) window



	iv. The enrolment-based period which is the number of days a new starter has to complete the course when they jo before they become non-compliant										
326544 Test	User	notexist@mhalearningzone.o Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home 85%	Completed 09/11/2020	
327224 Test	User	notexist@mhalearningzone.o Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home 80%	Completed 08/04/2021	
327433 Test	User	notexist@mhalearningzone.o Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Chaplain	Test Manager		Test Home 90%	Completed 30/11/2021	
327798 Test	User	notexist@mhalearningzone.o Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home 0%		
328575 Test	User	notexist@mhalearningzone.o Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Laundry Assistant	Test Manager		Test Home 82%		
328969 Test	User	notexist@mhalearningzone.o Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Senior Care Assistant	Test Manager		Test Home 58%	Completed 02/03/2022	Expired 14/04/2023
329103 Test	User	notexist@mhalearningzone.o Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home 90%	Completed 23/03/2022	
329846 Test	User	notexist@mhalearningzone.o Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Domestic Assistant	Test Manager		Test Home 93%		
330116 Test	User	notexist@mhalearningzone.o Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home 85%	Completed 15/08/2022	
330118 Test	User	notexist@mhalearningzone.o Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home 95%	Completed 26/08/2022	
330388 Test	User	notexist@mhalearningzone.o Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Cook	Test Manager		Test Home 82%		
330645 Test	User	notexist@mhalearningzone.o Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home 85%	Completed 03/11/2022	
330762 Test	User	notexist@mhalearningzone.o Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home 80%	Completed 20/11/2022	
330788 Test	User	notexist@mhalearningzone.o Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home 75%	Completed 01/12/2022	
4315 Test	User	notexist@mhalearningzone.o Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home 85%	Completed 01/11/2020	
6334 Test	User	notexist@mhalearningzone.o Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home 85%	Completed 12/11/2020	
6389 Test	User	notexist@mhalearningzone.o Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Kitchen Assistant	Test Manager		Test Home 65%		
6422 Test	User	notexist@mhalearningzone.o Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home 65%	Completed 17/12/2020	
6503 Test	User	notexist@mhalearningzone.o Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home 90%	Completed 17/11/2020	
7234 Test	User	notexist@mhalearningzone.o Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Chef	Test Manager		Test Home 76%		
8348 Test	User	notexist@mhalearningzone.o Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Domestic Assistant	Test Manager		Test Home 85%		
9487 Test	User	notexist@mhalearningzone.o Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Kitchen Assistant	Test Manager		Test Home 67%		
9743 Test	User	notexist@mhalearningzone.o Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home 81%	Completed 12/11/2020	08/12/2022
331323 Test	User	notexist@mhalearningzone.o Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home 0%		
331810 Test	User	notexist@mhalearningzone.o Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home 0%		
331418 Test	User	notexist@mhalearningzone.o Operations	Care Homes	Care Home Region 2	Care Homes Area - Test	Care Assistant	Test Manager		Test Home 0%		
notexist@m Test	User	notexist@mhalearningzone.org.uk					Test Manager	Volunteer	Test Home 100%		
notexist@m Test	User	notexist@mhalearningzone.org.uk					Test Manager	Volunteer	Test Home 0%		
notexist@m Test	User	notexist@mhalearningzone.org.uk					Test Manager	Volunteer	Test Home 100%		
notexist@m Test	User	notexist@mhalearningzone.org.uk					Test Manager	Volunteer	Test Home 0%		
notovist@m Tost	Usor	notoxist@mbalearsingtone.org.uk					Test Manager	Voluntoor	Tost Home 100%		
Totals									89%	100%	83%

25. By scrolling down to the bottom of the report there is a row labelled Totals

26. This row will provide you with the total percentage compliance level for the home / scheme / area (depending on what you

selected the report to include

27. In addition, each column in that row will then provide a percentage compliance level for each of the compliance courses



#### E Learning Zone Vicky Jackson (Admin) # Dashboard Course: Manageme A Profile S Mar Dashboard settings 0 Alert timeframe 30 days ..... **...** ₩. rs in the last 30 days 0 Users 0 Compliance courses were awarded to users in the last 30 days Ø 0 86% 76% **6%** 8%

### 2. How to run other reports

- Once you have clicked on the Learning Zone link and logged into your account as a manager you will be presented with the Managers Dashboard screen
- From the tabs at the top of the Dashboard information click **Reports**



Reports		3.	The Reports screen will be
Training Reports Saved reports Groups			displayed
Group manager	Summary reports	4	The reports are split into sections as
Influidual user renorts	Course reports simmary		
User training record	Course completions summary		follows;
Course reports by user	Compliance summary		<ol> <li>User progress reports – these</li> </ol>
Course completions (	Compliance summary report		reports will all provide
Predefined compliance RAG			individual user data based on
Course deadlines RAIs	-		individual user data based on
			selections you make
Compliance by user Compliance RAG			2. Summary Reports – these
			reports will all provide
			summary data based on the
			selections you make
		5.	Each report will not be covered in
			this document, as the principles for
			running each report are very similar.



User training record  Training Reports Saved reports Groups			6. Select a report that you would like to
553 Users			run.
1 2 3 4 5 6 7 8 9 10 12 » ▼ New filter			7. In this example the User Training
User full name	contains •		Record has been selected
First name Surname	contains		8. In the report screen there are various
Email address	contains •		options you can select from to find a
User profile fields	any field    contains  Adds filter		user who reports to you
First name / Surname		Options	9. Enter the information in the relevant
Abbey Jarraz		Show report Show gare dealls Show groups Download to Excel	field and click <b>Add filter</b>
Abdel Briki		Show report Show user details Show groups Download to Excel	
Abi Adagunodo		Show report Show user details Show groups Download to Excel	
1		A	



Active filters       User full name contains "Juvy Mayo"         Remove selected       Remove all filters         First name / Surname       Options	User training record Training Reports Saved reports Groups 1 / 553 Users New filter User full name First name Surname Email address User profile fields	contains   contains   contains   contains   contains   any field   contains   Add filter	10. In this example a <b>User Full Name</b> was entered 11. The user is now displayed at the bottom of the screen
First name / Surname Options	✓ Active filters	User full name contains "Juny Mayo"       Remove selected     Remove all filters	
Juny Mayo Show report Show user details Show groups Dromband to Finel	First name / Surname Juny Mayo	Options Show report Show user details Show groups Download to Fixed	



Training Reports Saved reports Groups					
Course completions Face to face sessions Compliance Competencies	Learning plans User certificates User details User groups User histor	c data			
Course completions					
Show 50 ¢ entries				Search:	
Course name	Course short name	Assignment type 🔹	Course status	Enrolment date (y-m-d)	Completion date
Fire Safety: A Practical Approach (Statutory)	Fire Safety: A Practical Approach (Statutory)	Statutory 1	Not started	2023-05-10	
H&S: Control of Substances Hazardous to Health (COSHH) (Statutory)	H&S: Control of Substances Hazardous to Health (COSHH) (Statutory)	Statutory 0	Completed	2021-03-19	2021-03-19
H&S: Risk Management (Statutory)	H&S: Risk Management (Statutory)	Statutory 0	Completed	2020-06-25	2020-06-25
Confidentiality and Information Handling (Statutory)	Confidentiality and Information Handling (Statutory)	Statutory I	Not started	2023-05-10	
Deprivation of Liberty Safeguards (DOLS) (Statutory)	Deprivation of Liberty Safeguards (DOLS) (Statutory)	Statutory 0	Completed	2021-12-09	2021-12-09
Infection Control: An Overview (Statutory)	Infection Control: An Overview (Statutory)	Statutory 0	Completed	2021-03-19	2021-03-19
The Mental Capacity Act (Statutory)	The Mental Capacity Act (Statutory)	Statutory 0	Completed	2021-03-19	2021-03-19
First Aid and Basic Life Support (Statutory)	First Aid and Basic Life Support (Statutory)	Statutory 1	Not started	2011-08-16	
Moving and Assisting People (Statutory)	Moving and Assisting People (Statutory)	Statutory 0	Completed	2022-09-15	2022-09-15
Protecting Children from Abuse (Regulatory)	Protecting Children from Abuse (Regulatory)	Regulatory 1	Not started	2023-05-10	
Safeguarding Adults at Risk (Regulatory)	Safeguarding Adults at Risk (Regulatory)	Regulatory 1	Not started	2023-05-10	
Falls: Balancing Risk (MHA Mandatory)	Falls: Balancing Risk (MHA Mandatory)	MHA Mandatory 0	Completed	2021-03-19	2021-03-19
Appropriate Use of Bedrails (MHA Mandatory)	Appropriate Use of Bedrails (MHA Mandatory)	MHA Mandatory 0	Completed	2020-11-09	2020-11-09
Dementia: An Introduction (MHA Mandatory)	Dementia: An Introduction (MHA Mandatory)	MHA Mandatory 0	Completed	2011-11-13	2011-11-13

12. By selecting **Show Report** on the previous screen you will be provided with all that users training data held in the system including

- Course name
- Type of course ie. Statutory, Regulatory, MHA mandatory.
   If blank then the course is a personal development course
- Course Status
- Enrolment date
- Completion date



Training Reports Saved reports Groups		13. By selecting Show User Details on
Course completions Face to face sessions Compliance	Competencies Learning plans User certificates User details User groups User historic data	the previous screen you will be
User details		
Username	305820	provided with an overview of the
First name	Juny	
Surname	Mayo	details held about that user in the
Account created	15/02/2023	
Email	notexist@mhalearningzone.org.uk	avetom
L4function	Operations	System
L5directorate	Care Homes	
L6regiondepartment	Care Home Region 1	14. If you notice that something is not
L7areateam	Care Homes Area - Home Counties	
Startdate	16/08/2011	correct here please email
Leavedate		I I
Jobtitle	Care Assistant	peoplesupport@mha.org.uk.to.get
Marrainame	Care Carponer	
	clancal penereminatorgue	this changed in iTrent
Ismanager	U	
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Location	Cirinide	



Training Rep	oorts Saved n	eports Groups					
Course completio	ons Face to fa	ace sessions Compliance Competencies	Learning plans User certificates	User details	User groups	User historic data	
User groups Show 50 + entr	ies					Search	
Group	Туре	Managers A	Courses			¢	0
All Users	All users group						
Care Home Training Group For: Care Assistant	User based profiles		01 Radar - Welcome to incident repor events and filtering, Appropriate Use Mandatory), Deprivation of Liberty Sa Falls: Balancing Risk (MHA Mandatory Aid and Basic Life Support (Statutory) Infection Control: An Overview (Statu Children from Abuse (Regulatory), Re	ting, 02 Radar - Dask of Bedrails (MHA Ma feguards (DOLS) (Sta ), Final Lap (MHA Ma H&S: Control of Sub ory), Moving and As Jucing Distressed Be	hboard navigation & indatory), Confidenti itutory), Documentin andatory), Fire Evacu ostances Hazardous sisting People (Statu haviours Level 1 (MF	8 setting an out of office, 03 Setar - How to raise an event, 05 Radar - Osnriew of an event, 06 Radar - Reviewing recorded mising and Information Handing Statutony), Oper Security Awareness (MHA Markataon), Dementa kan Introduction (MHA ting in a Care Environment (MHA Mandatory), Drephseury Awareness and Support of Swallowing Difficulties (MHA Mandatory), Care Security Security and Interduction (MHA integration), Tere Security (MHA Mandatory), First tus to Health (COHM) (Statutory), First Security (Statutory), First Security (Statutory), First Security (Statutory), First Security (Statutory), Net Restrict And Statutory), Protectial Repurson (Statutory), Protectial Repurson (Statutory), Protecting MHA Mandatory), Protecting MHA Mandatory), Protecting MHA Mandatory, Protecting MHA MAnd	
MHA Employees	User based profiles						
Autogroup for Location: Elmside	User based profiles	Amanda Weir, Ann Connell, Ann-Marie Coulthard, Beverley Hickey, Claire Carpenter, Emma Lindblom, Enoch Adams, Jason Gates, De Nawcliffe, Kate Horton, Kate Smith, Kate Nash, Katy Mitchell, Kay Henocq, Lauren Knight, Maddy Stretton, Melanie Parker, Shella Patel, Vilawan Hawkes, Yvonne Kiffin					
Care Homes - London East	User based profiles	Amanda Weir, Ann-Marie Coulthard, Beverley Hickey, Dan Ryan, Emma Lindblom, Jason Gates, Jo Rawciffe, Karen Slater, Kate Horton, Kate Smith, Kate Neikh, Katy Mitchell, Kay Henoca, Lauren Knight, Maddy Stretton, Mandy Carey, Melanie Parker, Sheila Patel, Yvanne Kiffin					
Autogroup for: Claire Carpenter	User based profiles	Claire Carpenter, Enoch Adams					

15. By selecting **Show Groups** on the previous screen you will be provided with an overview of any groups in the Learning Zone that this user is a member of.

16. These groups cannot be changed and are set by the People Development team to allocate

training and ensure the user appears

on the correct reports



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Course completions face to face sessions Compliance	e competer	ncies   learning pla	ns   User o	ertificates	User details	User groups	User historic	data	(+)	•									
																	_		



18. Please note the tabs in the spreadsheet

- Course completions this provides a list of all the courses either completed or not started by this user
- Face to face sessions this provides information about any face to face (or webinar) sesisons that thei user has attended, booked and not shown up to or booked and then cancelled
- Compliance this provides records for this user on just compliance courses
- Competencies (not used in the Learning Zone yet)
- Learning Plans (not used in the Learning Zone yet)
- User Certificates this provides links to any certificates the user has received for training completions
- Use groups this provides information on any groups that the user is part of for the purposes of the system set up
- 1. User historic data this provides information on any courses completed including those that are current and those that have been archived as they have expired



## 3. Using the Groups screen

v       50 •       entries       Search:       Search:       Search:       Search:       Search:       Search:       Search:       Courses       •       •       Courses       •       •       Courses       •       Courses       •       •       Courses       •       •       Courses       •       •       Courses       •       •       •       •       •       •       •       •
Name       Type       Members       Rules       Managers       Courses         utogroup for Location: Kenbrook       User based profiles       64       1       Amanda Weir, Ann-Marie Coulthard, Bernadette Reilly, Beverley Hickey, Emma Lindblom, Jason Gates, Jo Rawcliffe, Kate Horton, Kate Smith, Katie Nash       Image: Course of the second sec
utogroup for Location: Kenbrook User based profiles 64 1 Amanda Weir, Ann-Marie Coulthard, Bernadette Reilly, Beverley Hickey, Emma Lindblom, Jason Gates, Jo Rawcliffe, Kate Horton, Kate Smith, Katie Nash (+ 9 more)
Autogroup for Location: Lawnfield House User based profiles 48 1 Abi Adagunodo, Amanda Weir, Ann-Mane Coulthard, Beverley Hickey, Emma Lindblom, Hetlin Jani, Jason Gates, Jo Rawcliffe, Kate Horton, Kate Smith (+ 10 more)
Autogroup for Location: Riverview Lodge User based profiles 59 1 Amanda Weir, Anisha Raghwani, Ann-Marie Coulthard, Beverley Hickey, Constantin Ionescu, Emma Lindblom, Jason Gates, Jo Rawcliffe, Kate Horton, Kate Smith (+ 11 more)
Autogroup for Location: Willesden Court User based profiles 70 1 Allen Yabut, Amanda Weir, Ann-Marie Coulthard, Anne Fenlon, Beverley Hickey, Emma Lindblom, Jason Gates, Jo Rawcliffe, Josephine Naylor, Kate Horton (+ 10 more)
Autogroup for: Abiodum Williams User based profiles 8 1 Abiodum Williams, Mandy Carey
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Autogroup for: Lauren Sparg User based profiles 1 1 Lauren Sparg, Mandy Carey
Natogroup for: Mandy Carey User based profiles 8 1 Karen Slater, Mandy Carey
Autogroup for: Manjit Laute User based profiles 4 1 Mandy Carey, Manjit Laute
Lutogroup for: Sarah Law User based profiles 4 1 Mandy Carey, Sarah Law
Autogroup for: Sirisha Kodakandla User based profiles 3 1 Mandy Carey, Sirisha Kodakandla
Lutogroup for: Solomon-Paul Ekuase User based profiles 6 1 Mandy Carey, Solomon-Paul Ekuase
Autogroup for: Urmi John User based profiles 19 1 Mandy Carey, Urmi John
rre Homes - London East User based profiles 513 1 Amanda Weir, Ann-Marie Coulthard, Beverley Hickey, Dan Ryan, Emma Lindblom, Jason Gates, Jo Rawcliffe, Karen Slater, Kate Horton, Kate Smith (+ 9 more)
ving 1 to 14 of 14 entries First Previous 1

peopledevelopment@mha.org.uk