User Guide: Running Reports from the Business Enterprise Information (BI) Tool

Purpose

Three (3) reports were created for **HR Liaisons and Training Program Managers**. This document will provide step-by-step instructions for running these reports and exporting them into Excel, allowing you to pull out data to meet your reporting needs.

Department History

- This report provides a list of individuals within the department **who have enrolled in a class**.
- The following is a shortened list of information provided for each individual: HR Organization, Name, Job, Enrollment Status, Bargaining Unit, Completion date for CBT classes.

Mandatory Training Enrollment

- **For Employees:** This report includes **everyone in the department**, and will indicate each individual's enrollment (or non-enrollment) status.
- **For Managers:** This report includes **all managers and supervisors** in the department, and each one's enrollment (or non-enrollment) status.
- The following is a shortened list of information provided for each individual: Name, Enrollment Status, Position Title, Grade, Supervisor, and Division.

Exporting the Report

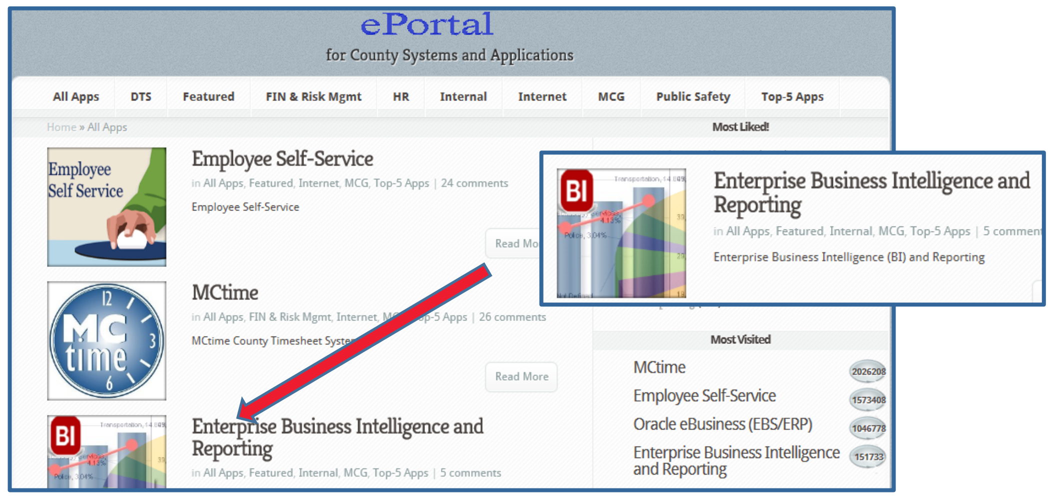
Although you can view the report directly from the BI Tool, exporting it into Excel will provide additional columns of information not included on the screen. In addition, you can use Pivot Tools in Excel to provide more specialized reports.

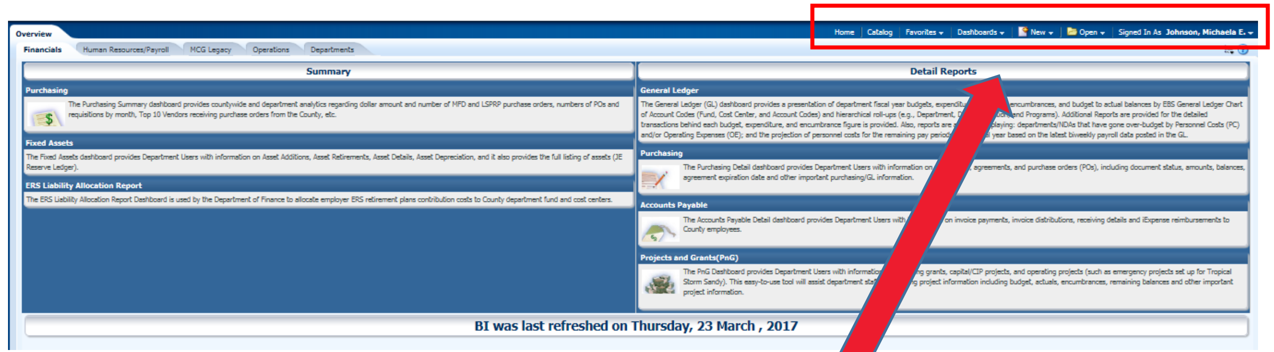
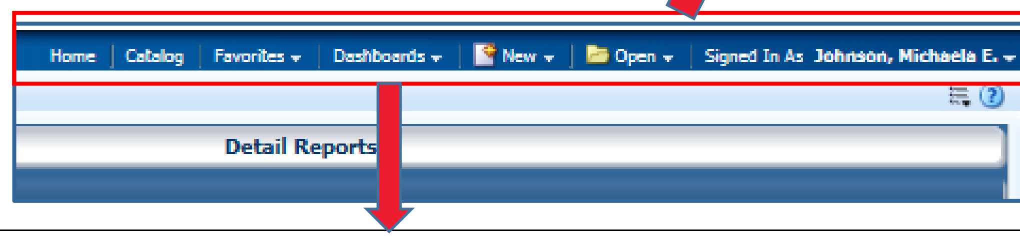
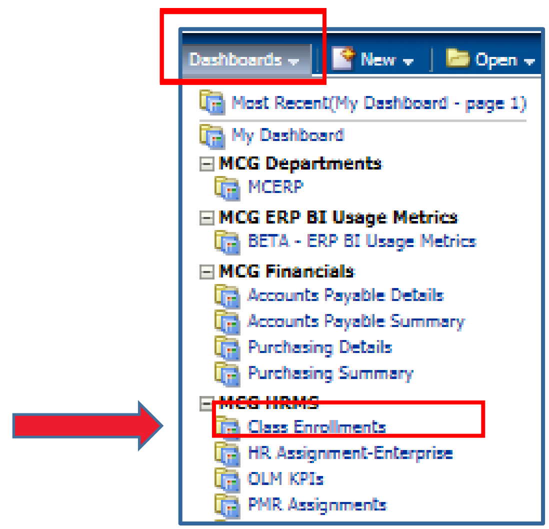
Additional Information

Only those individuals who have signed a Confidentiality Form, and have been given access through OHR Training and Organizational Development can retrieve information from the BI Tool.

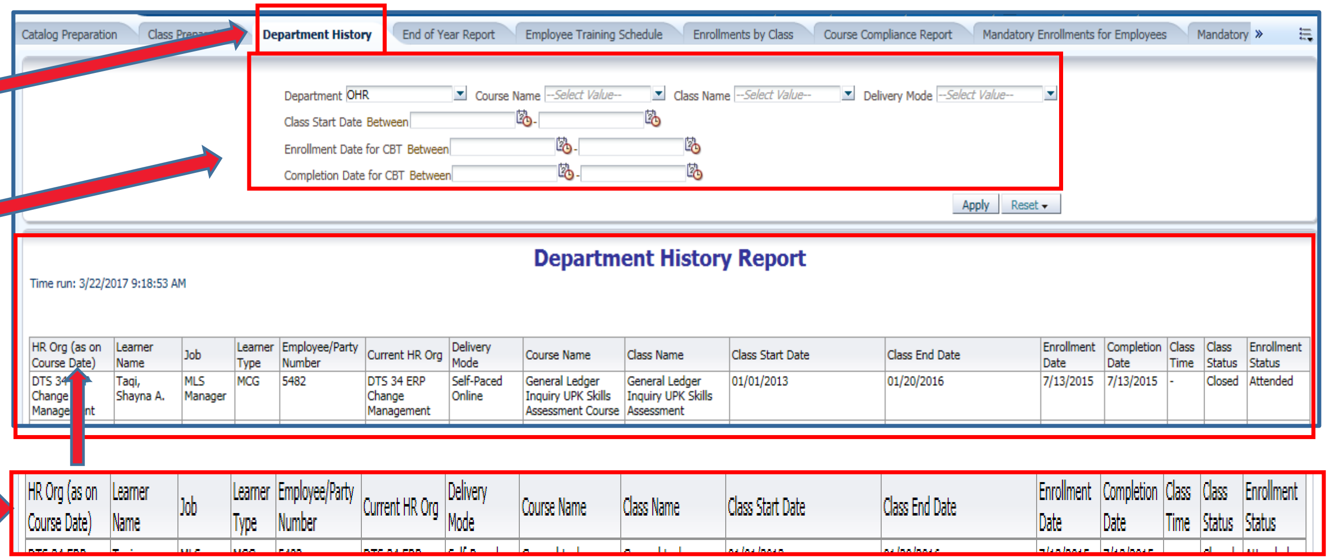
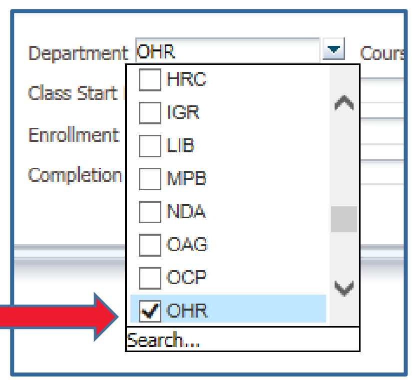
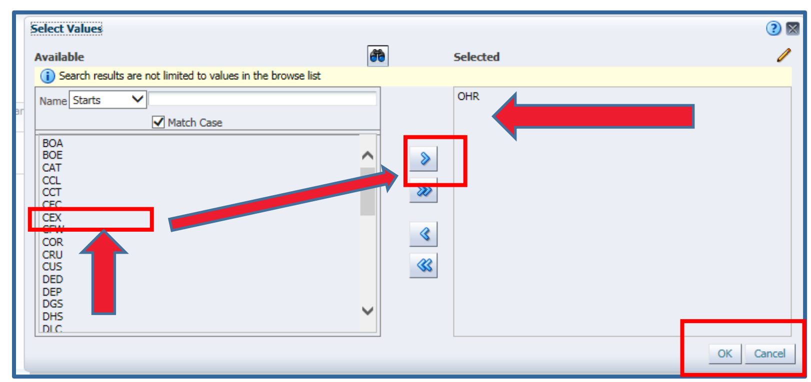
Questions

If you have questions using this guide, please contact the OLM Administrator at OLM.Admin@MontgomeryCountyMD.gov or 240-777-5116.

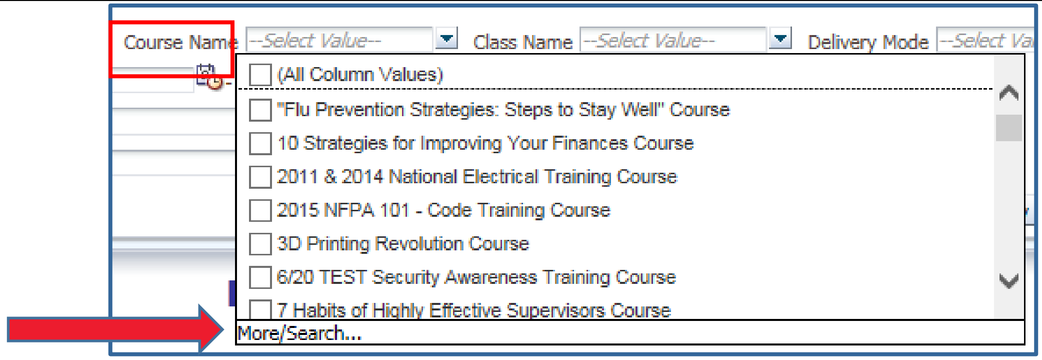
Logging Into the BI Tool		
Step	**Action**	**Visual**
1.	Go to the **AccessMCG ePortal**: https://eportal.montgomerycountymd.gov. Enter your MCG Network user name and password. Click **Log in.**	
2.	Click on **Enterprise Business Intelligence and Reporting (BI)** application.	

<table>
<tr><th>Step</th><th>Action</th><th>Visual</th></tr>
<tr><td>3.</td><td>The BI Tool Overview Page will open.</td><td>
</td></tr>
<tr><td>2.</td><td>Go to the Menu located to the far right.</td><td>
</td></tr>
<tr><td>3.</td><td>Click on Dashboard
A drop down menu will appear.
Go to MCG HRMS
Click on Class Enrollments.
The Class Enrollments Dashboard will open.</td><td>
</td></tr>
</table>

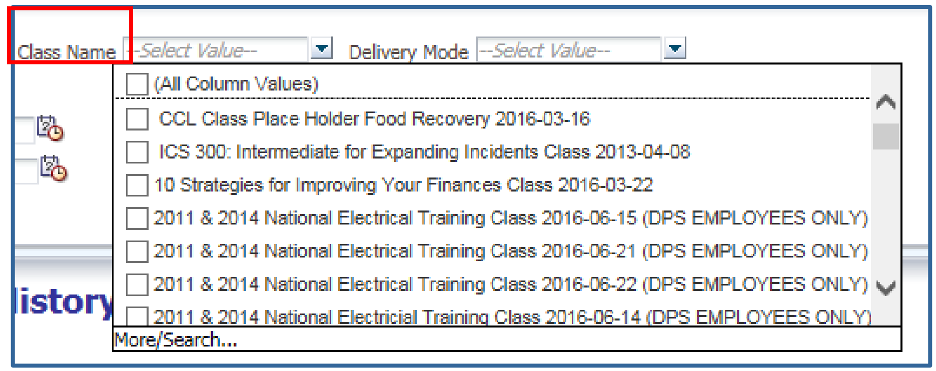
The Department History Report Dashboard

Step	Action	Screen Shots
1.	**The Department History Report** provides a list of individuals within the department **who have enrolled in a class**. 1. Select **Department History** tab. 2. The **parameters** are at the top. 3. Below that you will see the **last report** ran. 4. Notice the **information** which will be reflected in the report.	
2.	**Setting Parameters** 1. Select **Department** • The report will **default** to OHR. • **Remove** the checkmark from the OHR box. • Using the **scroll bar** find and select your **Department** • Move it to the **Selected Box** using the **arrow**. • Click **OK**.	

2. Select the **Course**
- Click **More/Search.**
- Remove the **checked Match Case** option by clicking on the square.
- Type in the first few letters of the **Course Title**.
- A list will appear.
- Select the **Course**.
- Click **OK**.

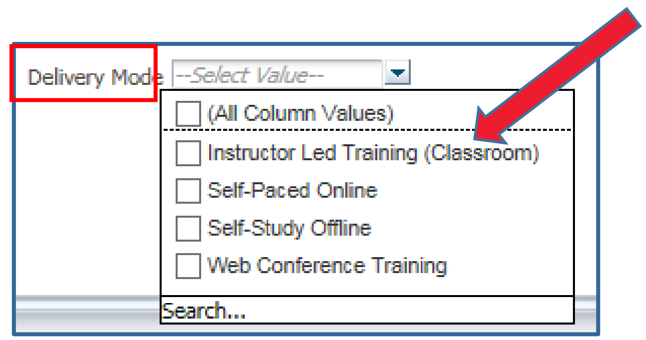


3. Select the Corresponding **Class**.
- Click **More/Search**.
- Type in the first few letters of the **Class Title**.
- A list will appear.
- Select the **Class**.
- Click **OK**.



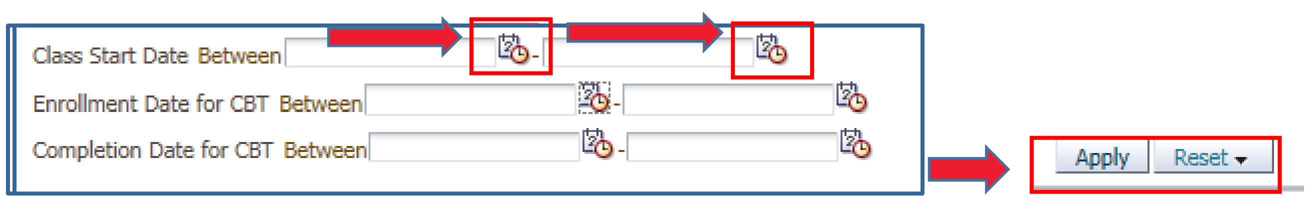
4. Select **Delivery** Mode

Defines the way the class was presented.
- Click the **drop down** menus.
- Select the **Mode**.
- Click **OK**.

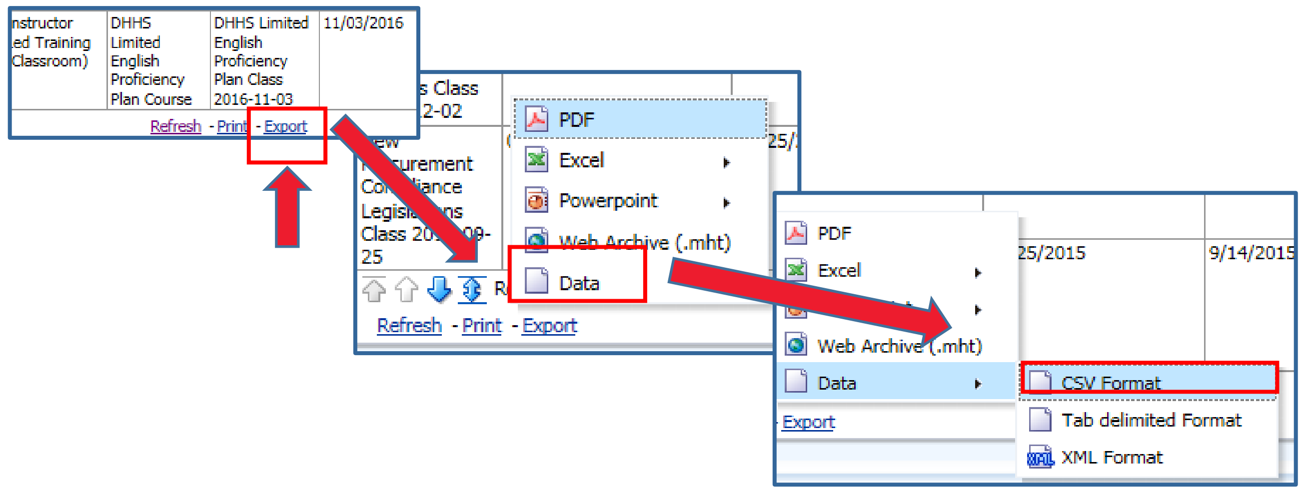


1. Select **Time Frame**
- You will usually only use the *Class Start Date Between* option.
- Use the scheduling icons to select each date.

2. Click **Apply**



Exporting a Report

Step	Action	Screen Shots
3.	To export the report, **scroll** down to the **bottom** of the screen. • Click **Export**. The Format Menu will open. • Click **Data** • Click **CSV** Format You will be prompted to save the document using the **“Save As**” option. Change it from CSV file to an **Excel** File. Saving the report in Excel will allow you to manipulate the data to fit your needs; format the columns, use PivotTables, etc.	

<table>
<tr><th colspan="3">The Mandatory Training Reports</th></tr>
<tr><th>Step</th><th>Action</th><th>Visual</th></tr>
<tr><td></td><td>

On the Dashboard, the **Mandatory Enrollment** tabs are on the far right.

1. Click the arrow to see both reports

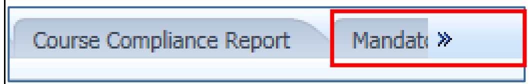
2. Select the Report.

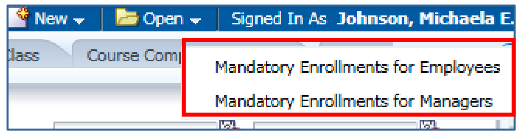
The **parameters** are at the top.

Below that you will see the **last report** ran.

Notice the **information** which will be reflected in the report.

</td><td>



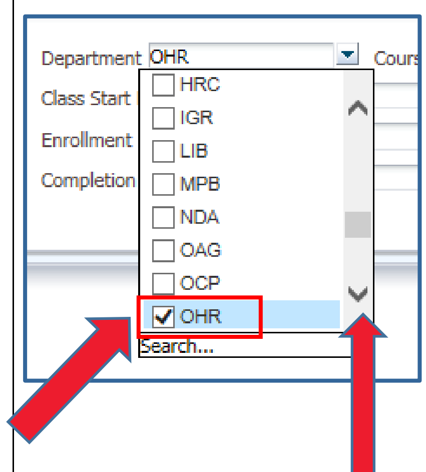


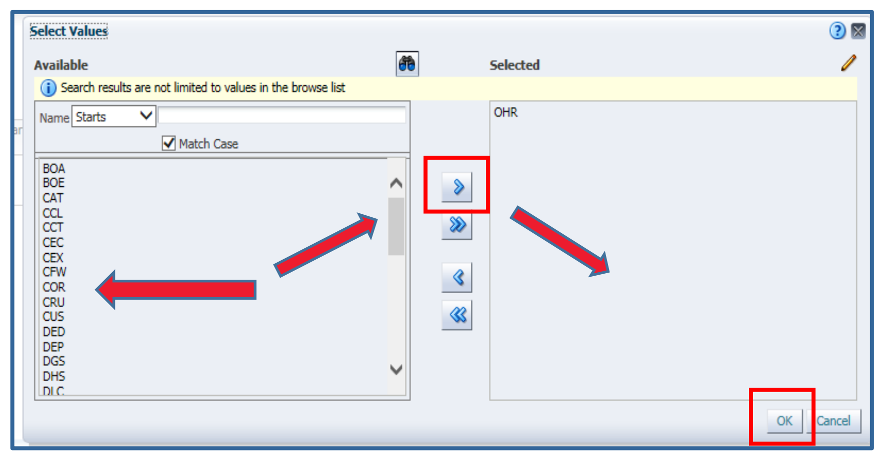
</td></tr>
<tr><td></td><td>

Setting Parameters

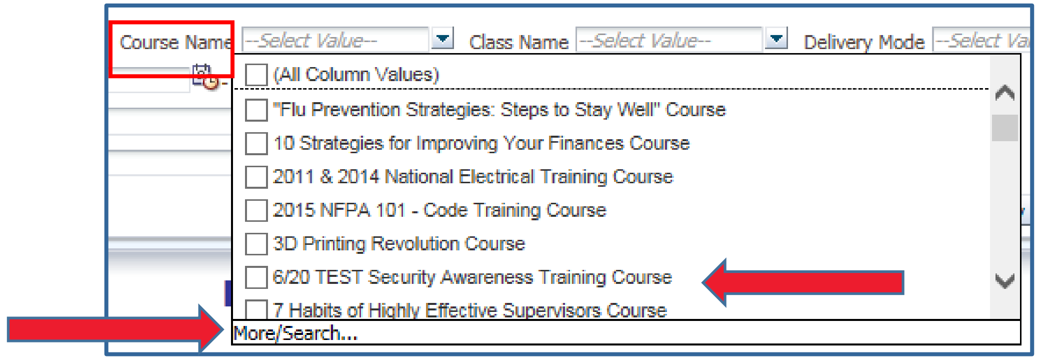
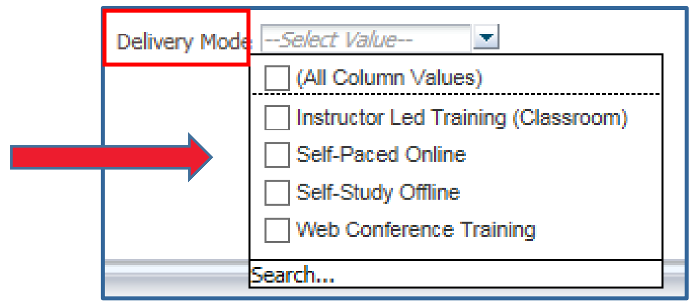
5. **Select Department**
   - The report will default to OHR.
   - **Remove** the checkmark from the OHR box.
   - Using the scroll bar find and select your **Department**.
   - **Move** it to the Selected Box by clicking the arrow.
   - Click **OK**.

</td><td>





</td></tr>
</table>

Step	Action	Visual
	6. Select the **Course** • Click **More/Search** • Remove the checked **Match Case** option by clicking on the square. • Type in the first few letters of the **Course Title** • A list will appear. • Select the **Course**. • Click **OK**. **Select Delivery Mode** *Defines the way the class was presented.* • Click the **drop down** menus. • Select the **Mode**. • Click **OK**.	 

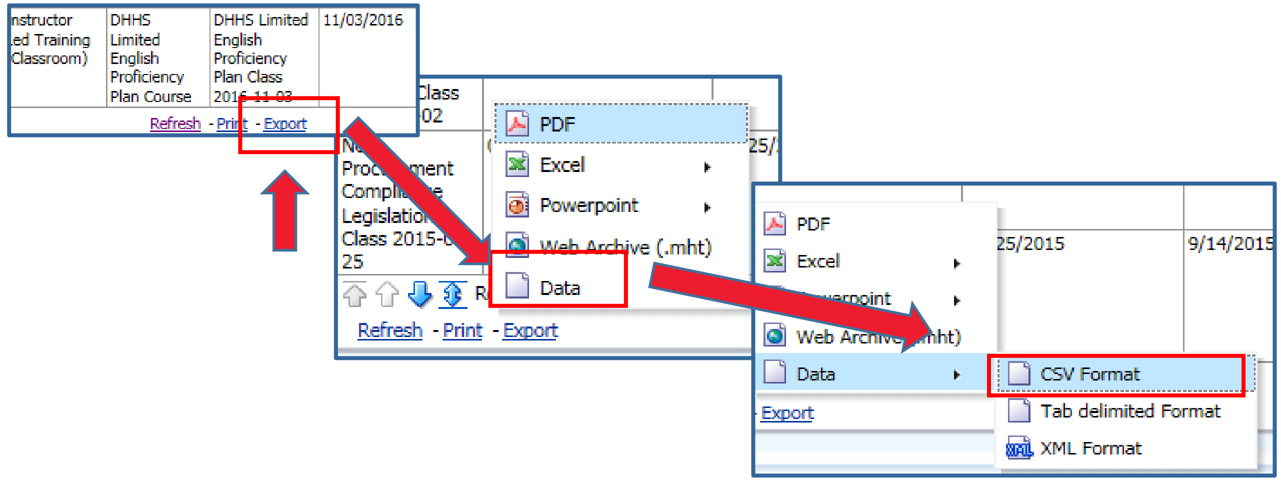
<table>
<tr><th colspan="3">Exporting a Report</th></tr>
<tr><th>Step</th><th>Action</th><th>Screen Shots</th></tr>
<tr>
<td></td>
<td>

Exporting Report
Scroll down to the bottom of the page.

- Click **Export**.
  The Format Menu will open.
- Click **Data**
- Click **CSV** Format
  You will be prompted to save the document using the **"Save As"** option. Change it from CSV file to an **Excel** File.

Saving the report in Excel will allow you to manipulate the data to fit your needs; format the columns, use PivotTables, etc.

</td>
<td>



</td>
</tr>
</table>