



## 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

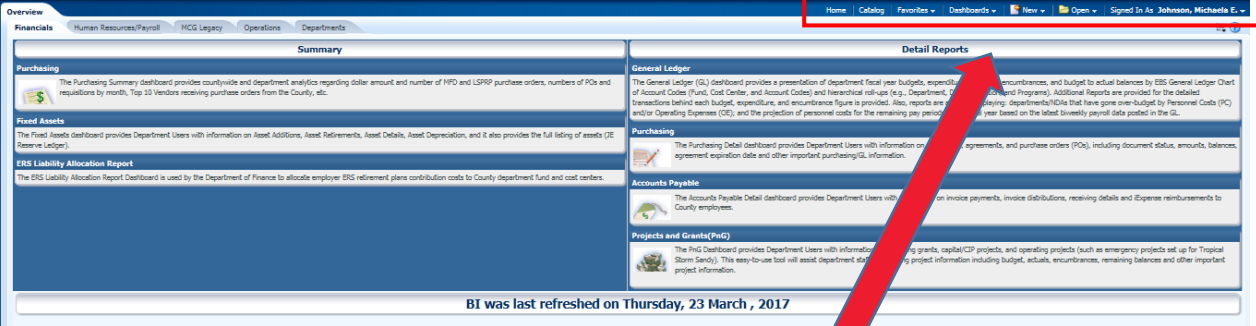
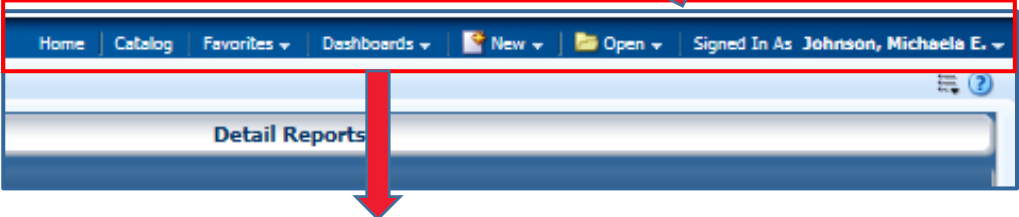
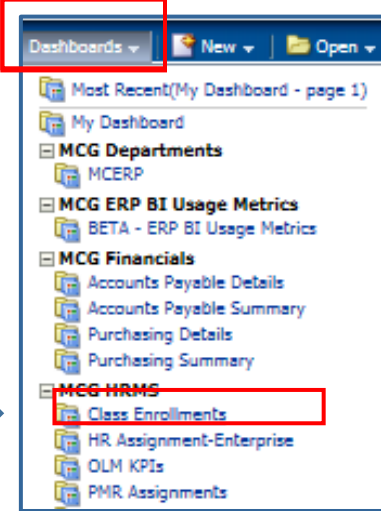
Only those individuals who have signed a Confidentiality Form, and have been given access through OHR Training and Organizational Development can retrieve information from the BI Tool.

### Questions

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

## Logging Into the BI Tool

Step	Action	Visual
1.	<p>Go to the <b>AccessMCG ePortal</b>:  <a href="https://eportal.montgomerycountymd.gov">https://eportal.montgomerycountymd.gov</a>.</p> <p>Enter your MCG Network user name and password.</p> <p>Click <b>Log in</b>.</p>	
2.	<p>Click on <b>Enterprise Business Intelligence and Reporting (BI)</b> application.</p>	

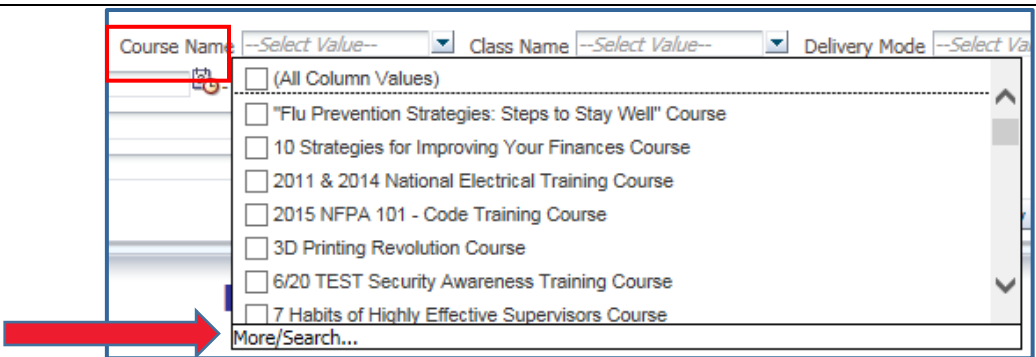
Step	Action	Visual
3.	The BI Tool Overview Page will open.	
2.	Go to the <b>Menu</b> located to the far right.	
3.	Click on <b>Dashboard</b> <ul style="list-style-type: none"> <li>• A drop down menu will appear.</li> <li>• Go to <b>MCG HRMS</b></li> <li>• Click on <b>Class Enrollments</b>.</li> <li>• The Class Enrollments Dashboard will open.</li> </ul>	

# The Department History Report Dashboard

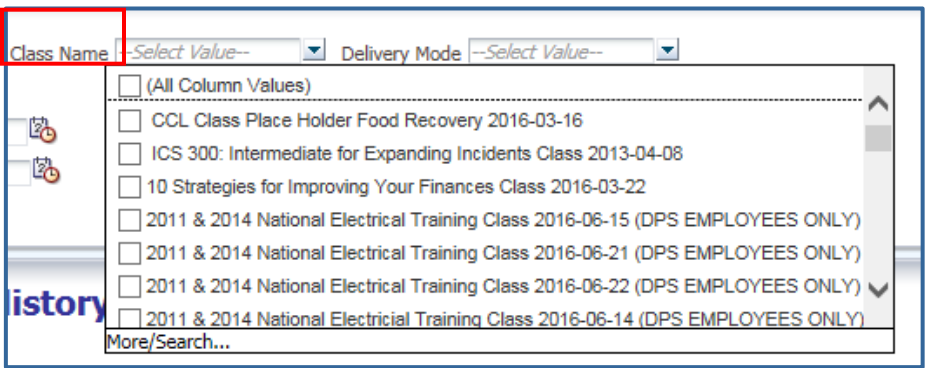
Step	Action	Screen Shots																																
1.	<p>The Department History Report provides a list of individuals within the department <b>who have enrolled in a class.</b></p> <ol style="list-style-type: none"> <li>1. Select <b>Department History</b> tab.</li> <li>2. The <b>parameters</b> are at the top.</li> <li>3. Below that you will see the <b>last report ran.</b></li> <li>4. Notice the <b>information</b> which will be reflected in the report.</li> </ol>	<p>The screenshot shows the 'Department History' tab selected. Below the tab are filter parameters: Department (OHR), Course Name, Class Name, and Delivery Mode. Below these are date filters for Class Start, Enrollment Date, and Completion Date. A table titled 'Department History Report' shows the results of the last report run on 3/22/2017 at 9:18:53 AM. The table has columns for HR Org, Learner Name, Job, Learner Type, Employee/Party Number, Current HR Org, Delivery Mode, Course Name, Class Name, Class Start Date, Class End Date, Enrollment Date, Completion Date, Class Time, Class Status, and Enrollment Status. A red box highlights the first row of data.</p> <table border="1"> <thead> <tr> <th>HR Org (as on Course Date)</th> <th>Learner Name</th> <th>Job</th> <th>Learner Type</th> <th>Employee/Party Number</th> <th>Current HR Org</th> <th>Delivery Mode</th> <th>Course Name</th> <th>Class Name</th> <th>Class Start Date</th> <th>Class End Date</th> <th>Enrollment Date</th> <th>Completion Date</th> <th>Class Time</th> <th>Class Status</th> <th>Enrollment Status</th> </tr> </thead> <tbody> <tr> <td>DTS 34 Change Management</td> <td>Taqi, Shayna A.</td> <td>MLS Manager</td> <td>MCG</td> <td>5482</td> <td>DTS 34 ERP Change Management</td> <td>Self-Paced Online</td> <td>General Ledger Inquiry UPK Skills Assessment Course</td> <td>General Ledger Inquiry UPK Skills Assessment</td> <td>01/01/2013</td> <td>01/20/2016</td> <td>7/13/2015</td> <td>7/13/2015</td> <td>-</td> <td>Closed</td> <td>Attended</td> </tr> </tbody> </table>	HR Org (as on Course Date)	Learner Name	Job	Learner Type	Employee/Party Number	Current HR Org	Delivery Mode	Course Name	Class Name	Class Start Date	Class End Date	Enrollment Date	Completion Date	Class Time	Class Status	Enrollment Status	DTS 34 Change Management	Taqi, Shayna A.	MLS Manager	MCG	5482	DTS 34 ERP Change Management	Self-Paced Online	General Ledger Inquiry UPK Skills Assessment Course	General Ledger Inquiry UPK Skills Assessment	01/01/2013	01/20/2016	7/13/2015	7/13/2015	-	Closed	Attended
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Step	Action	Screen Shots
2.	<p><b>Setting Parameters</b></p> <ol style="list-style-type: none"> <li>1. Select <b>Department</b> <ul style="list-style-type: none"> <li>• The report will <b>default</b> to OHR.</li> <li>• <b>Remove</b> the checkmark from the OHR box.</li> <li>• Using the <b>scroll bar</b> find and select your <b>Department</b></li> <li>• Move it to the <b>Selected Box</b> using the <b>arrow</b>.</li> <li>• Click <b>OK</b>.</li> </ul> </li> </ol>	<p>The first screenshot shows a list of departments with checkboxes. OHR is checked. A red arrow points to the OHR checkbox. The second screenshot shows a 'Select Values' dialog box with an 'Available' list and a 'Selected' list. OHR is in the 'Selected' list. A red arrow points to the right arrow button between the lists, and another red arrow points to the OHR entry in the 'Selected' list. The 'OK' button is also highlighted.</p>

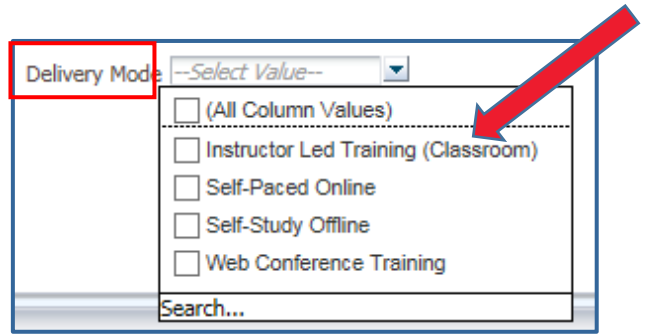
2. Select the **Course**
- Click **More/Search**.
  - Remove the **checked Match Case** option by clicking on the square.
  - Type in the first few letters of the **Course Title**.
  - A list will appear.
  - Select the **Course**.
  - Click **OK**.



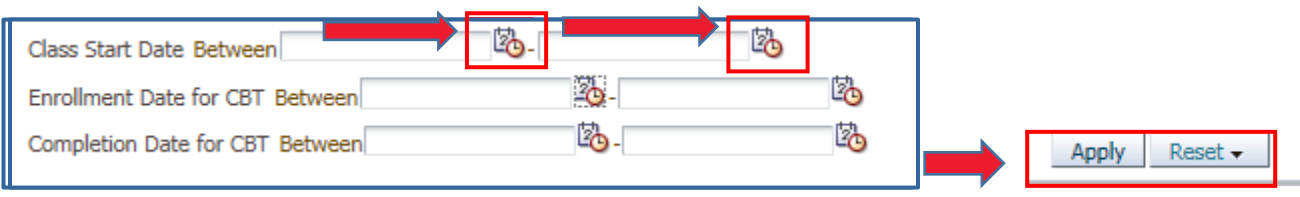
3. Select the Corresponding **Class**.
- Click **More/Search**.
  - Type in the first few letters of the **Class Title**.
  - A list will appear.
  - Select the **Class**.
  - Click **OK**.



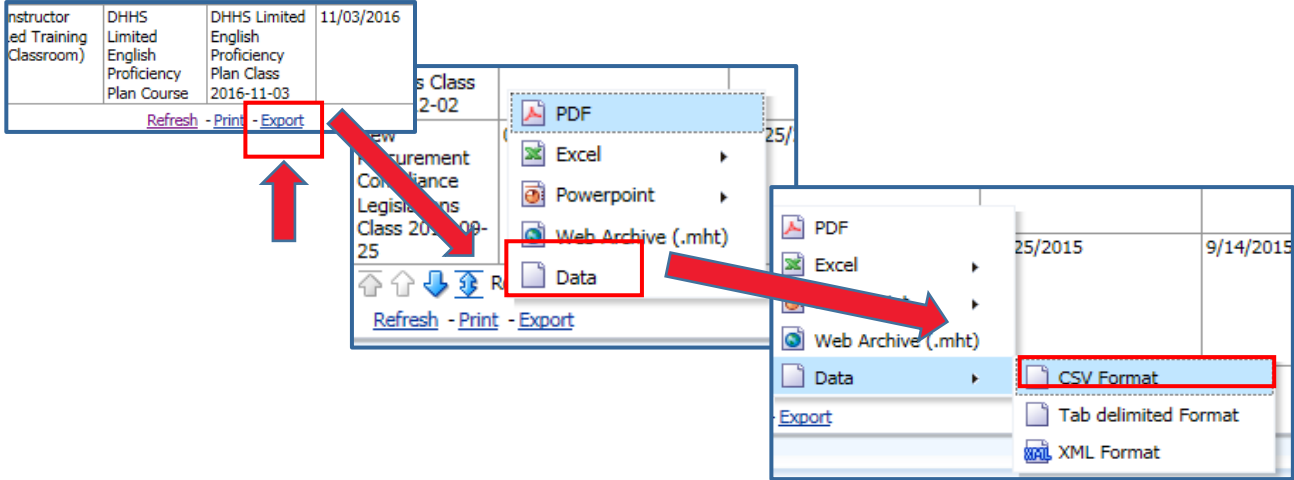
4. Select **Delivery Mode**  
*Defines the way the class was presented.*
- Click the **drop down** menus.
  - Select the **Mode**.
  - Click **OK**.



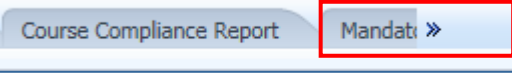
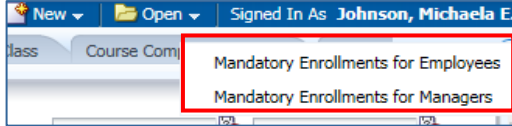
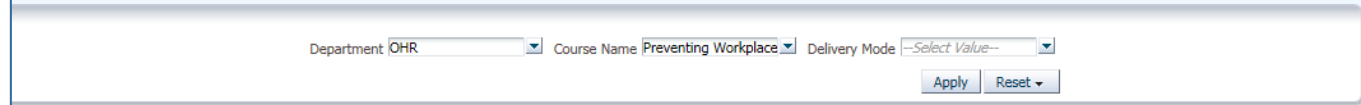

1. Select **Time Frame**
- You will usually only use the *Class Start Date Between* option.
  - Use the scheduling icons to select each date.
2. Click **Apply**

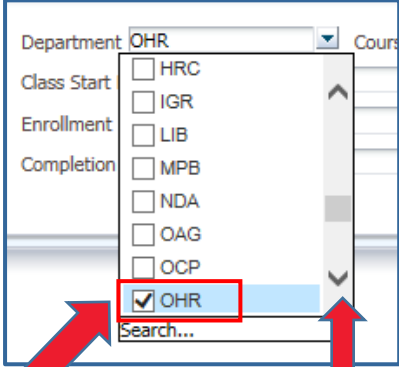
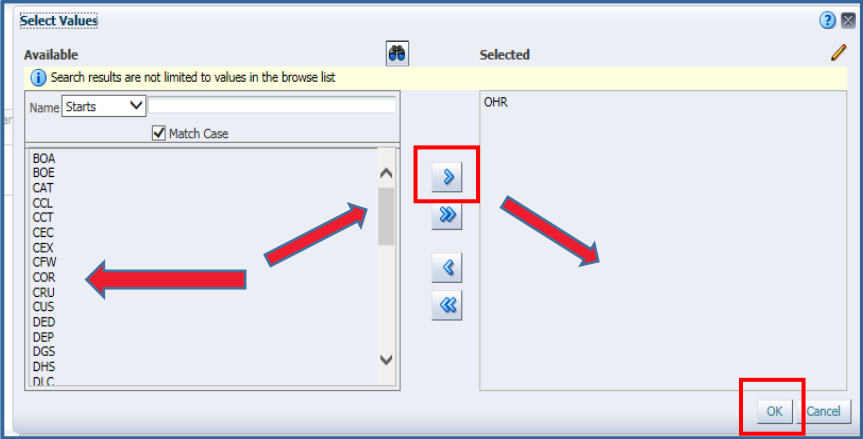


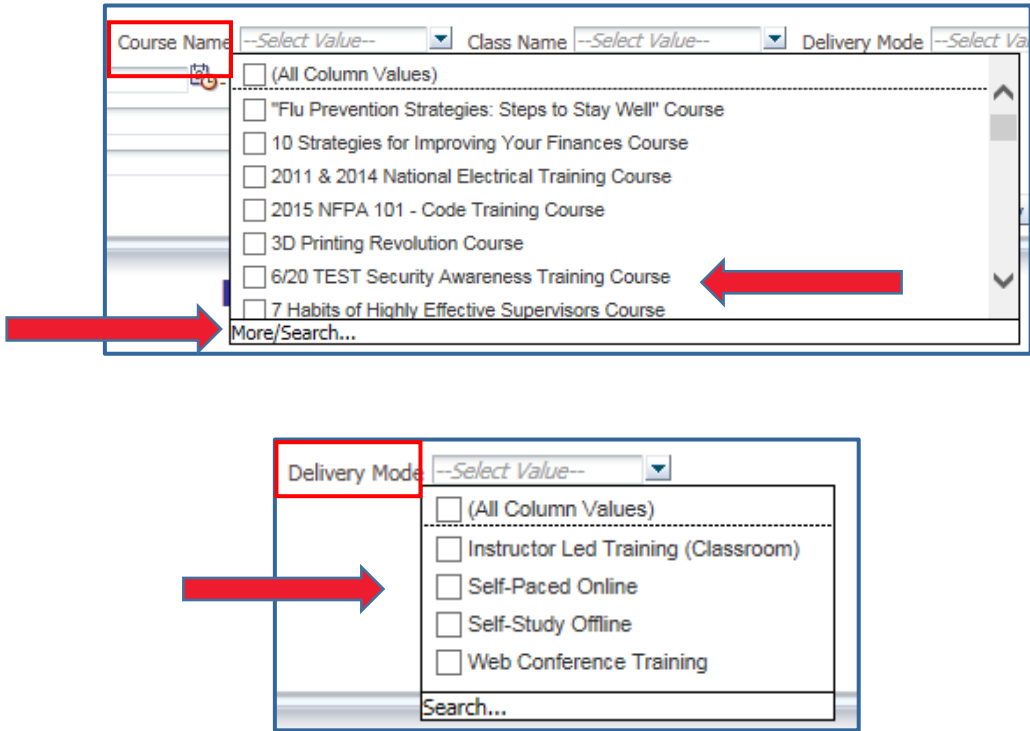
## Exporting a Report

Step	Action	Screen Shots
3.	<p>To export the report, <b>scroll</b> down to the <b>bottom</b> of the screen.</p> <ul style="list-style-type: none"><li>• Click <b>Export</b>. The Format Menu will open.</li><li>• Click <b>Data</b></li><li>• Click <b>CSV Format</b> You will be prompted to save the document using the <b>“Save As”</b> option. Change it from CSV file to an <b>Excel File</b>.</li></ul> <p>Saving the report in Excel will allow you to manipulate the data to fit your needs; format the columns, use PivotTables, etc.</p>	

# The Mandatory Training Reports

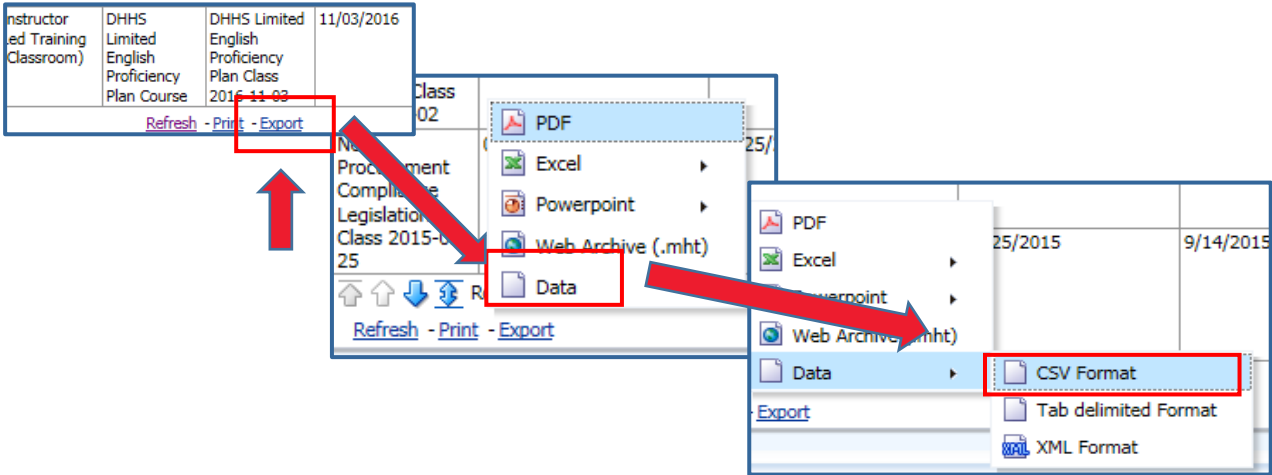
Step	Action	Visual																		
	<p>On the Dashboard, the <b>Mandatory Enrollment</b> tabs are on the far right.</p> <p>1. Click the arrow to see both reports</p> <p>2. Select the Report.</p> <p>The <b>parameters</b> are at the top. →</p> <p>Below that you will see the <b>last report</b> ran. →</p> <p>Notice the <b>information</b> which will be reflected in the report. →</p>	   <p style="text-align: center;"><b>Mandatory Enrollment by Department</b></p> <p>Time run: 9/1/2016 12:15:23 PM</p> <table border="1"> <thead> <tr> <th>Attendance Status</th> <th>Learner Name</th> <th>Supervisor Name</th> <th>Division</th> <th>Department</th> <th>Hire Date</th> <th>Course Name</th> <th>Course End Date</th> <th>Course Completion Date</th> </tr> </thead> <tbody> <tr> <td>Not Attended</td> <td>Fulco, Belinda J.</td> <td>Plucinski, Karen J.</td> <td>OHR 33 Health and Employee Welfare Division</td> <td>OHR</td> <td>6/19/2000 12:00:00 AM</td> <td>Preventing Workplace Harassment Course</td> <td></td> <td></td> </tr> </tbody> </table> 	Attendance Status	Learner Name	Supervisor Name	Division	Department	Hire Date	Course Name	Course End Date	Course Completion Date	Not Attended	Fulco, Belinda J.	Plucinski, Karen J.	OHR 33 Health and Employee Welfare Division	OHR	6/19/2000 12:00:00 AM	Preventing Workplace Harassment Course		
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<p><b>Setting Parameters</b></p> <p>5. <b>Select Department</b></p> <ul style="list-style-type: none"> <li>The report will default to OHR.</li> <li><b>Remove</b> the checkmark from the OHR box.</li> <li>Using the scroll bar find and select your <b>Department</b>.</li> <li><b>Move</b> it to the Selected Box by clicking the arrow.</li> <li>Click <b>OK</b>.</li> </ul>	 
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Step	Action	Visual
	<p>6. Select the <b>Course</b></p> <ul style="list-style-type: none"> <li>• Click <b>More/Search</b></li> <li>• Remove the checked <b>Match Case</b> option by clicking on the square.</li> <li>• Type in the first few letters of the <b>Course Title</b></li> <li>• A list will appear.</li> <li>• Select the <b>Course</b>.</li> <li>• Click <b>OK</b>.</li> </ul> <p><b>Select Delivery Mode</b>  <i>Defines the way the class was presented.</i></p> <ul style="list-style-type: none"> <li>• Click the <b>drop down</b> menus.</li> <li>• Select the <b>Mode</b>.</li> <li>• Click <b>OK</b>.</li> </ul>	 <p>The visual shows a software interface for selecting a course. At the top, there are three dropdown menus: 'Course Name', 'Class Name', and 'Delivery Mode', all with '--Select Value--' as their current selection. Below these is a list of courses, each with an unchecked checkbox. The courses listed are: '(All Column Values)', '"Flu Prevention Strategies: Steps to Stay Well" Course', '10 Strategies for Improving Your Finances Course', '2011 &amp; 2014 National Electrical Training Course', '2015 NFPA 101 - Code Training Course', '3D Printing Revolution Course', '6/20 TEST Security Awareness Training Course', and '7 Habits of Highly Effective Supervisors Course'. A red arrow points from the left towards the '7 Habits of Highly Effective Supervisors Course' entry. Another red arrow points from the right towards the same entry. Below the course list is a 'More/Search...' button. Below the course list is a 'Delivery Mode' dropdown menu, which is highlighted with a red box. A red arrow points from the left towards this dropdown. The dropdown menu is open, showing options: '(All Column Values)', 'Instructor Led Training (Classroom)', 'Self-Paced Online', 'Self-Study Offline', and 'Web Conference Training'. A 'Search...' field is visible at the bottom of the dropdown menu.</p>



## Exporting a Report

Step	Action	Screen Shots
	<p><b>Exporting Report</b> <b>Scroll down to the bottom of the page.</b></p> <ul style="list-style-type: none"><li>• Click <b>Export</b>. The Format Menu will open.</li><li>• Click <b>Data</b></li><li>• Click <b>CSV Format</b> You will be prompted to save the document using the “<b>Save As</b>” option. Change it from CSV file to an <b>Excel</b> File.</li></ul> <p>Saving the report in Excel will allow you to manipulate the data to fit your needs; format the columns, use PivotTables, etc.</p>	 <p>The screenshot shows a data table with columns for Instructor, DHHS, DHHS Limited, and Date. Below the table is a 'Refresh - Print - Export' menu. A red box highlights the 'Export' button. An arrow points from 'Export' to a second menu that lists 'PDF', 'Excel', 'Powerpoint', 'Web Archive (.mht)', and 'Data'. A red box highlights the 'Data' option. An arrow points from 'Data' to a third menu that lists 'PDF', 'Excel', 'Powerpoint', 'Web Archive (.mht)', and 'Data'. A red box highlights the 'Data' option, and a sub-menu is shown with 'CSV Format', 'Tab delimited Format', and 'XML Format'. A red box highlights the 'CSV Format' option.</p>