



Early Childhood Australia
Learning Hub



ECA Learning Hub LMS

how to
GUIDE

Create Reports:
Account Manager

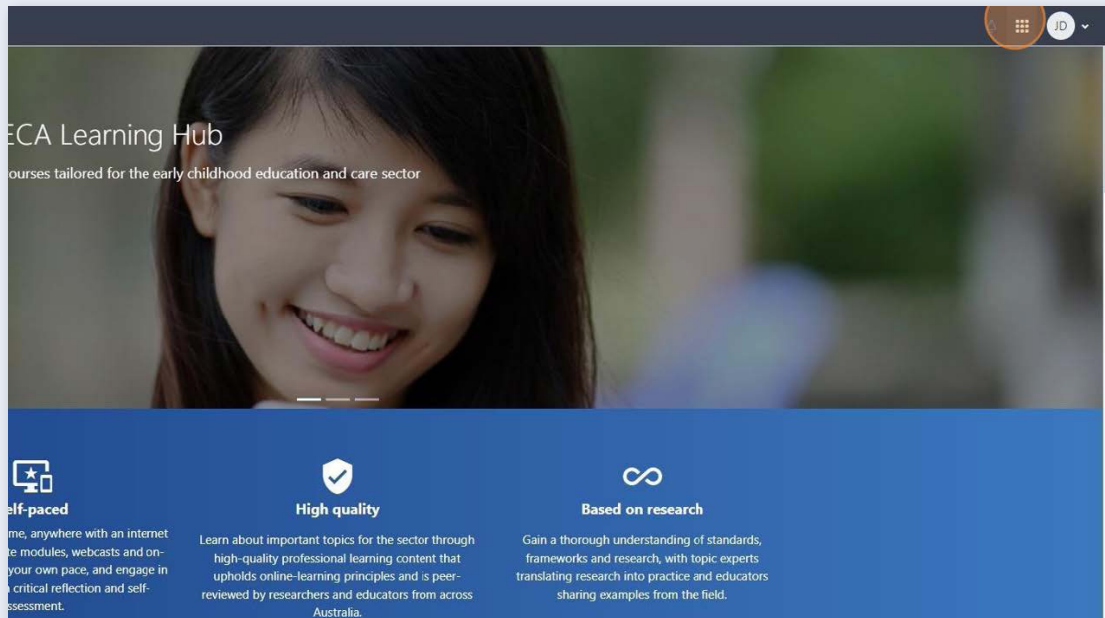


1

Navigate to <https://onlinelearninghub.earlychildhoodaustralia.org.au/?redirect=0>

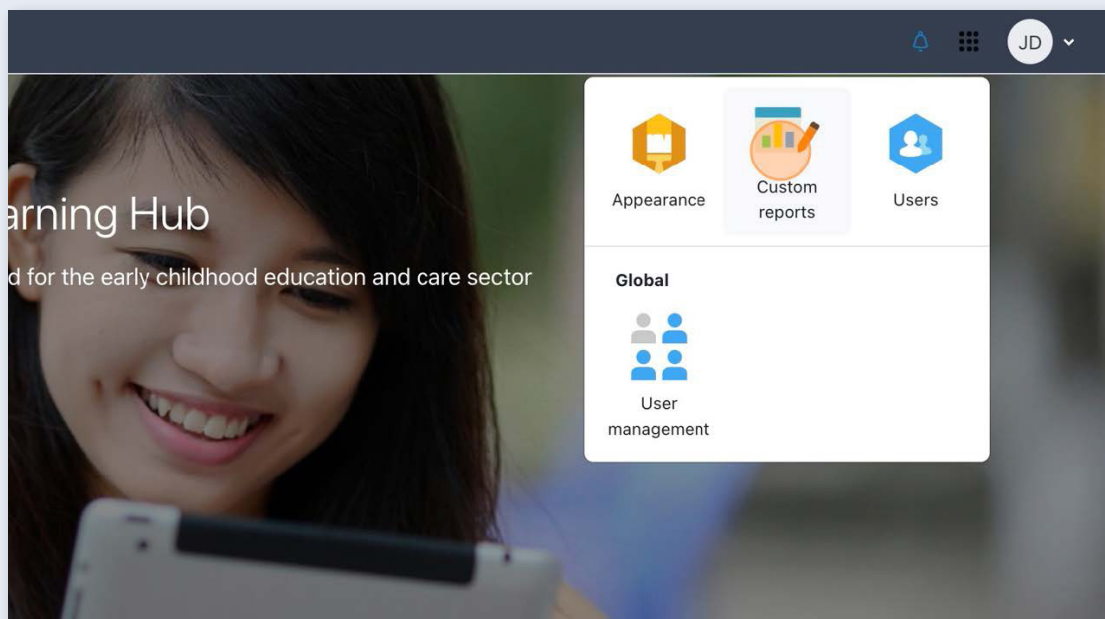
2

Open the **Workplace launcher**.



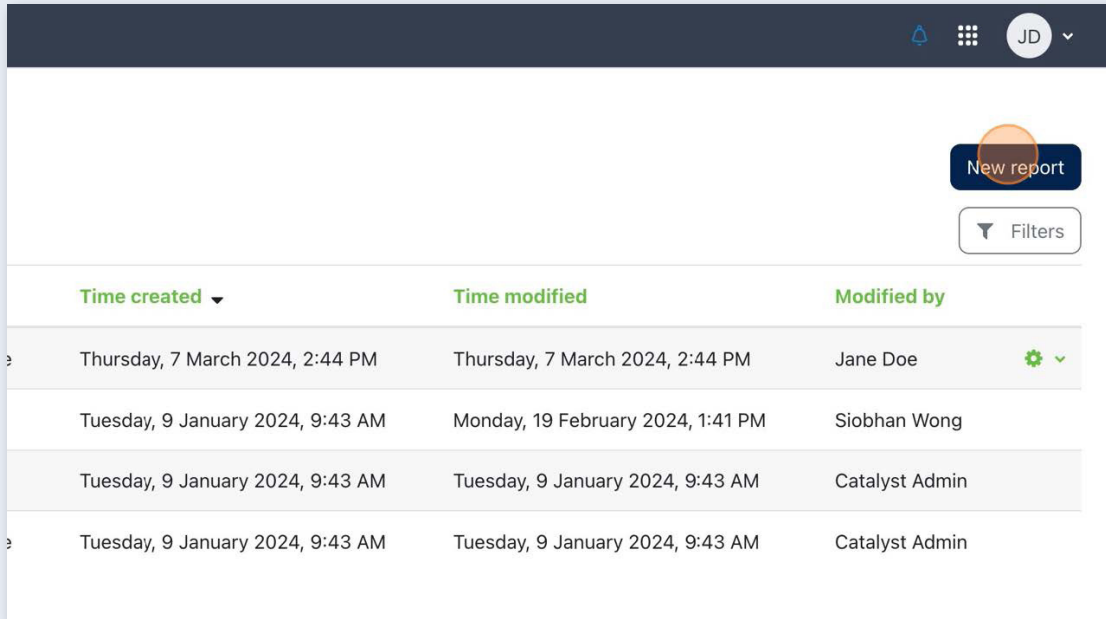
3

Click **Custom reports**.



4

Click **New report**.

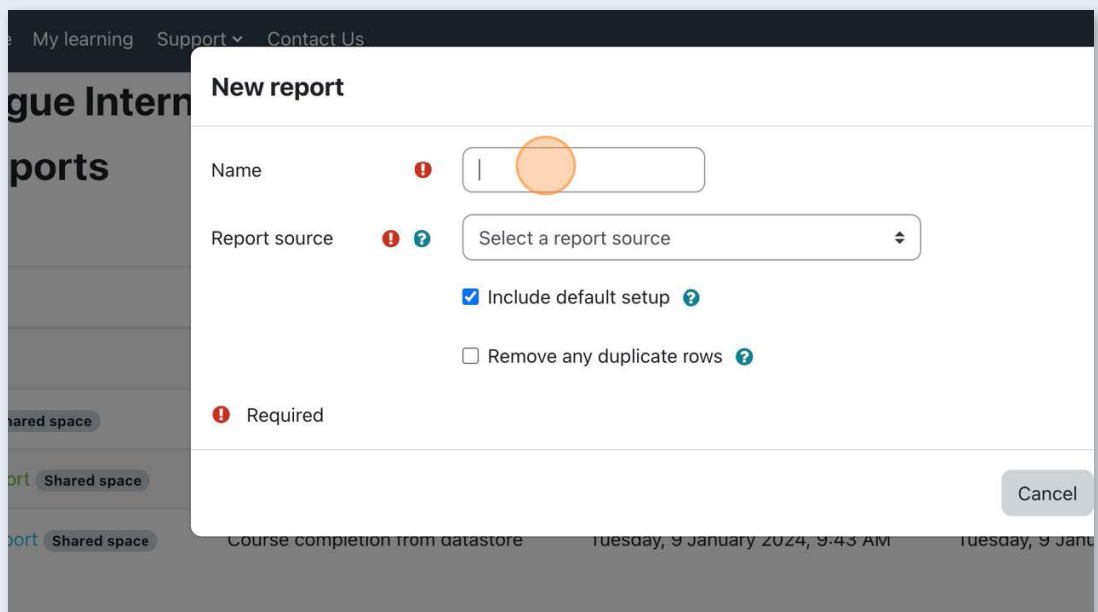


The screenshot shows a dashboard with a dark header containing a bell icon, a grid icon, and a user profile 'JD'. Below the header is a table with columns: 'Time created', 'Time modified', and 'Modified by'. A 'New report' button is highlighted in the top right corner. Below the table is a 'Filters' button.

Time created	Time modified	Modified by
Thursday, 7 March 2024, 2:44 PM	Thursday, 7 March 2024, 2:44 PM	Jane Doe
Tuesday, 9 January 2024, 9:43 AM	Monday, 19 February 2024, 1:41 PM	Siobhan Wong
Tuesday, 9 January 2024, 9:43 AM	Tuesday, 9 January 2024, 9:43 AM	Catalyst Admin
Tuesday, 9 January 2024, 9:43 AM	Tuesday, 9 January 2024, 9:43 AM	Catalyst Admin

5

Enter a name for the report.



The screenshot shows a 'New report' dialog box with the following fields and options:

- Name:** A text input field with a red exclamation mark icon and an orange circle highlighting the input area.
- Report source:** A dropdown menu with a red exclamation mark and a question mark icon, and the text 'Select a report source'.
- Include default setup** (with a question mark icon)
- Remove any duplicate rows** (with a question mark icon)
- Required:** A red exclamation mark icon.
- Cancel:** A button in the bottom right corner.

6

Select a report source from where data is to be pulled.

The screenshot shows a 'New report' dialog box with the following fields and options:

- Name:** Monthly Completion Sta (highlighted with a green box)
- Report source:** Select a report source (highlighted with a green box)
- Include default setup ?
- Remove any duplicate rows ?

At the bottom left, there is a red exclamation mark icon followed by the text 'Required'. At the bottom right, there is a 'Cancel' button.

7

By default, the report will have some boilerplate settings enabled. These defaults can be disabled if a report does not require them. The ? icon can be clicked to view details about this setting.

The screenshot shows the 'New report' dialog box with the following fields and options:

- Name:** Monthly Completion Sta
- Report source:** Course completion from datastore (highlighted with a green box)
- Include default setup ? (highlighted with a green box)
- Remove any duplicate rows ?

At the bottom left, there is a red exclamation mark icon followed by the text 'Required'. At the bottom right, there are 'Cancel' and 'Save' buttons.

8

Click **Save**.

The screenshot shows a user management interface. A dialog box is open in the foreground, containing a dropdown menu with the text 'Use completion from datastore', a checkbox for 'Include default setup', and a checkbox for 'Remove any duplicate rows'. At the bottom of the dialog are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted with an orange circle. In the background, a table is visible with columns for 'Modified by', 'Date', and 'User'. The table contains several rows of data, including 'Jane Doe', 'Siobhan Wong', and 'Catalyst Admin'. At the bottom of the page, there is a footer with contact information: 'Phone: 1800 356 900' and 'Email: Click here'.

9

On the left, the data columns can be seen. You can add them to the report using the + symbol located to the right of the column data label.

The screenshot shows a user management dashboard. On the left, there is a sidebar with a search bar and a list of data columns. The columns are: 'Course ID number', 'Format', 'Data store user', 'First name', 'Last name', 'Email address', 'ID number', 'Username', 'Data store completion', and 'Time enrolled'. Each column has a '+' symbol to its right. The 'Email address' column is highlighted with a green border. On the right, there is a table with two columns: 'Course full name' and 'First name'. The table contains several rows of data, including 'A conversation with Dr Stuart Shanker', 'Module 1: Management in education and care', 'Module 2: Defining purpose—Service philosophy, values, ethics and vision', 'Module 3: Strategic and business planning', 'Module 4: Governance roles and responsibilities', 'A good place to be a child: Creating effective early learning environments', 'Acting Ethically: Exploring the ECA Code of Ethics', and 'Emotion Coaching: A transformational tool'. The 'First name' column contains the names 'Michael', 'Michael', 'Michael', 'Michael', 'Jane', 'Jane', and 'Jane'.

10

Click here:

Format +	A conversation with Dr Stuart Shanker	Michael
Data store user ^	Module 1: Management in education and care	Michael
First name +	Module 2: Defining purpose—Service philosophy, values, ethics and vision	Michael
Last name +	Module 3: Strategic and business planning	Michael
Email address +	Module 4: Governance roles and responsibilities	Michael
ID number +	A good place to be a child: Creating effective early learning environments	Jane
Username +	Acting Ethically: Exploring the ECA Code of Ethics	Jane
Data store completion ^	Emotion Coaching: A transformational tool	Jane
Time enrolled +		

11

The data columns can be reordered by hovering over the button shown below and dragged to the left or right.

ME x	+ DATA STORE COMPLETION · TIME COMPLETED x	+ DATA STORE USER · EMAIL ADDRESS x
	Time completed ✎ No aggregation ▾	Email address ✎ No aggregation ▾
	Monday, 18 September 2023, 10:39 AM	mb@test.com
	Monday, 6 November 2023, 10:39 AM	mb@test.com
	Monday, 6 November 2023, 10:41 AM	mb@test.com



The report can be filtered using the drop-down menu on the right.

12

Let's see an example. Open the **Filters** drop-down menu.

The screenshot shows a report interface with a table on the left and a sidebar on the right. The table has columns for 'FIRST NAME', 'DATA STORE USER', and 'EMAIL ADDRESS'. The 'EMAIL ADDRESS' column is selected, and the filter 'Email address' is applied. The table contains five rows of data, all with 'mb@test.com' in the email address column. The sidebar on the right has a 'Conditions' section with a 'Select a condition...' dropdown menu highlighted in green. Below it, there is a 'Filters' section with a dropdown menu highlighted in orange. The 'Sorting' and 'Card view' sections are also visible.


13

Click the **Select a filter** drop-down menu.


The screenshot shows the same report interface as in step 12. The 'Filters' dropdown menu in the sidebar is now open, showing a 'Select a filter...' dropdown menu highlighted in orange. Below it, a filter is selected: 'DATA STORE COURSE - COURSE FULL NAME' with the value 'Course full name'. The table on the left now shows six rows of data, with the last row having 'eclearninghub@test.com' in the email address column. The 'Conditions' section is still visible at the top of the sidebar.

14



Let's sort this report so that the latest completions are seen first. Click the **Sorting** drop-down menu.


Email address 		
No aggregation ▼		
mb@test.com		Buk
mb@test.com		Buk
mb@test.com		Buk
mb@test.com		Buk
mb@test.com		Buk
eclearninghub@test.com		Do


There are no conditions selected

Filters  ^

Select a filter... ▼


+ DATA STORE COURSE · COURSE FULL NAME 
Course full name 



Sorting  ▼


Card view  ▼

15

Check the **Time completed** field. The arrow directly to the left of each field will reverse the order.

Email address 		
No aggregation ▼		
mb@test.com		Buk
mb@test.com		Buk
mb@test.com		Buk
mb@test.com		Buk
mb@test.com		Buk
eclearninghub@test.com		Do

+ DATA STORE COURSE · COURSE FULL NAME 
NAME
Course full name 

Sorting  ^


+ ↑ Course full name

+ ↑ First name

+ ↑ Last name

+ ↑ Time completed

+ ↑ Email address

Card view  ▼

16

Click **Save changes**.

Time completed	
No aggregation ▼	
Tuesday, 25 July 2023, 2:13 PM	
Tuesday, 25 July 2023, 2:15 PM	
Friday, 15 September 2023, 3:00 PM	
Friday, 15 September 2023, 3:06 PM	
Monday, 18 September 2023, 10:39 AM	

First name
 Last name
 Time completed
 Email address

Card view

Columns visible: 1

First column title: No

Save changes

17

Click **Audience**.

Monthly Completion Status

[Editor](#)
Audience
Schedules
Access

Search

ID number

Username

Data store completion

Time enrolled

Time started

Time completed

L ADDRESS x	DATA STORE USER · LAST NAME x	DATA STORE COMPLET
	Last name	Time completec
	No aggregation ▼	No aggregation ▼
Richards		Tuesday, 25 July 2023, 2:
Richards		Tuesday, 25 July 2023, 2:

18

Click **All users**.

Editor Audience Schedules Access

Search [magnifying glass icon]

There are no audiences for this report

Site ^

All users +

Manually added users +

Organisation structure ^

Managers +

19

Let's add **Managers** so that they can view the report.

Site ^

All users +

Manually added users +

Organisation structure ^

Managers +

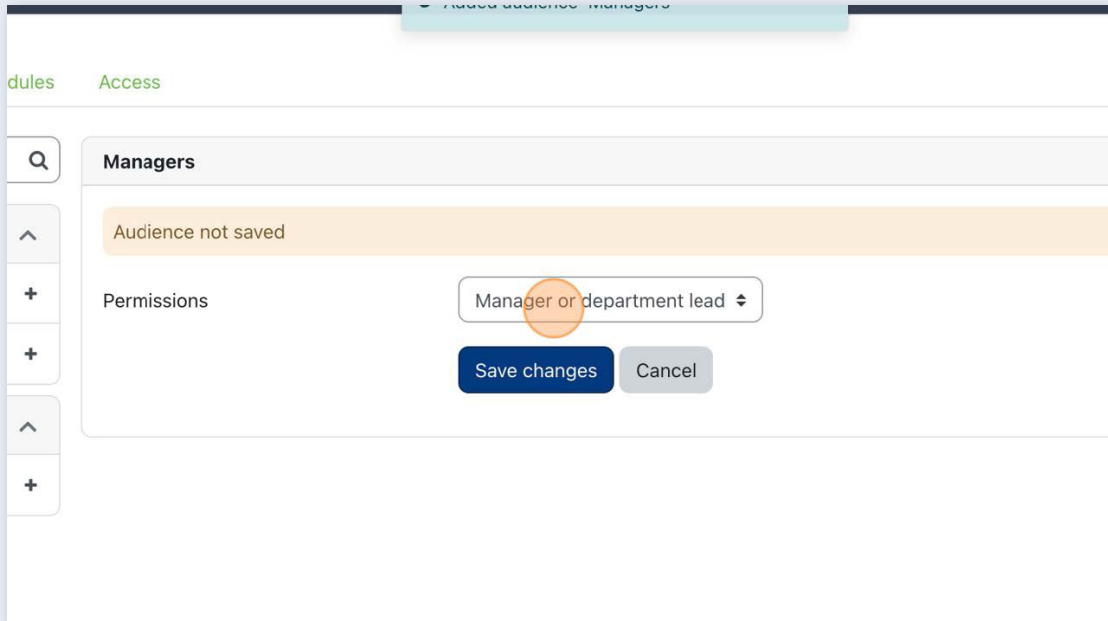
Audience not saved

All site users

Save changes Cancel

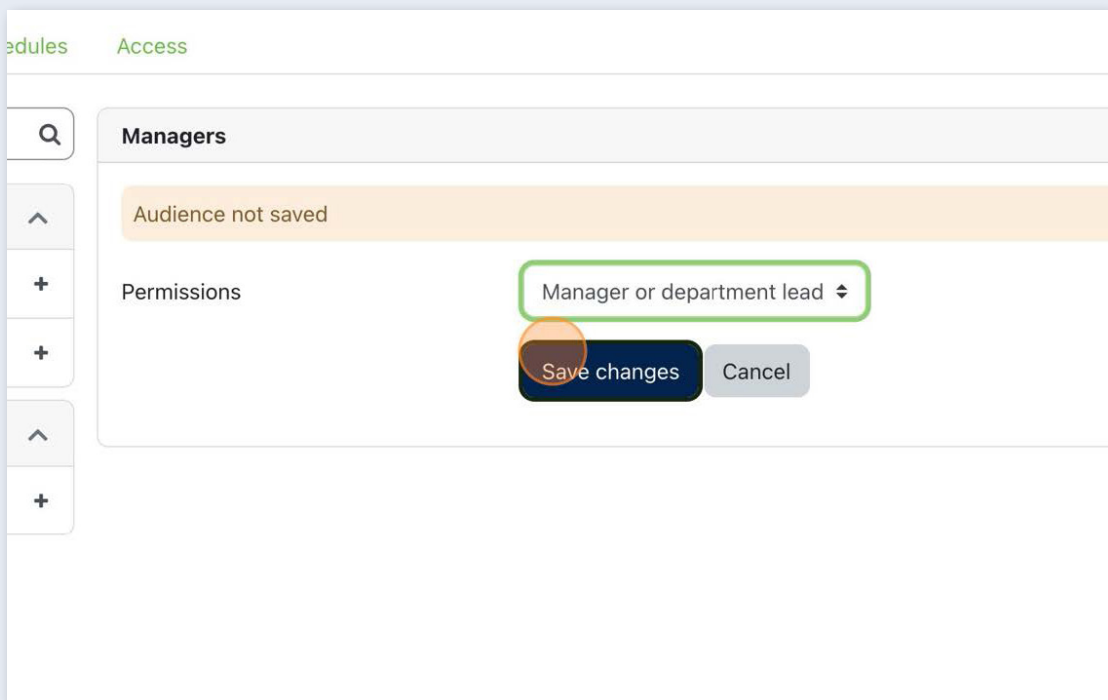
20

Permissions can be left as they are.



21

Click **Save changes**.



22

Now let's set up a schedule for our report.

The screenshot shows the 'Monthly Completion Status' dashboard. At the top right, a notification says 'Audience saved'. Below the title bar are four tabs: 'Editor', 'Audience', 'Schedules', and 'Access'. The 'Schedules' tab is highlighted with a green box and an orange circle. On the left side, there is a search bar and a list of filters: 'Site' (with an up arrow), 'All users' (with a plus sign), 'Manually added users' (with a plus sign), 'Organisation structure' (with an up arrow), and 'Managers' (with a plus sign). On the right side, there is a 'Managers' section with a pencil icon and a dropdown menu showing 'Permissions: Manager or department lead'.

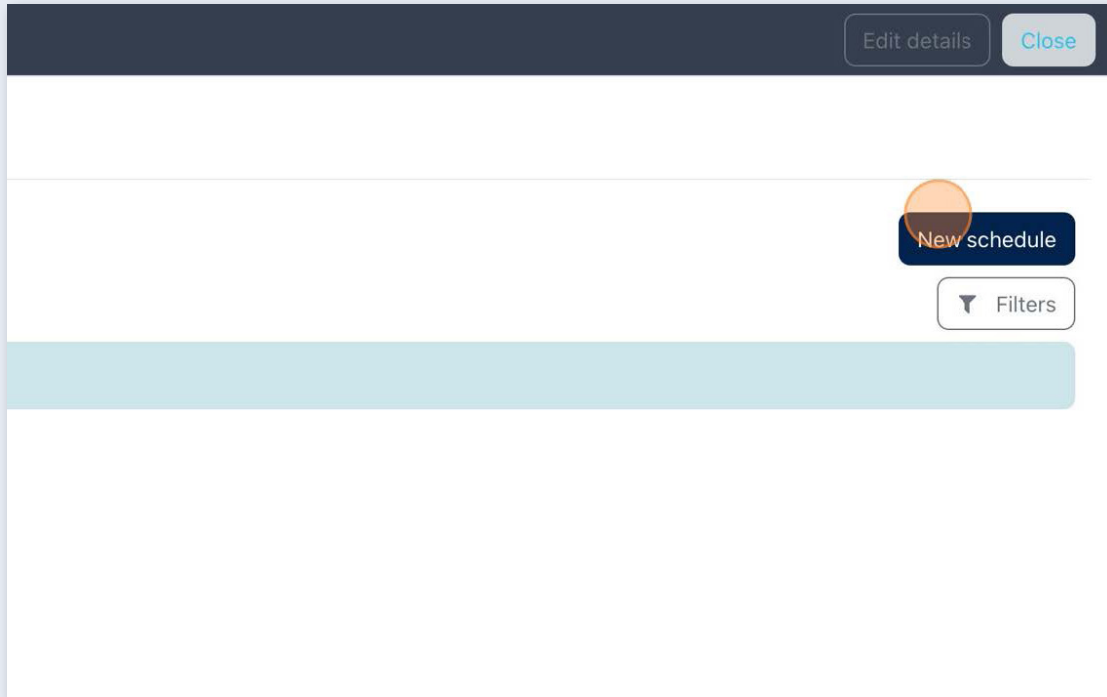
23

Click **Schedules**.

The screenshot shows the 'Monthly' dashboard. The 'Schedules' tab is highlighted with a green box and an orange circle. A 'Managers' dialog box is open on the right side. The dialog box has a title bar 'Managers' and a message 'Audience not saved' in a yellow box. Below the message, there is a 'Permissions' section with a dropdown menu showing 'Manager or department lead'. At the bottom of the dialog box, there are two buttons: 'Save changes' and 'Cancel'.

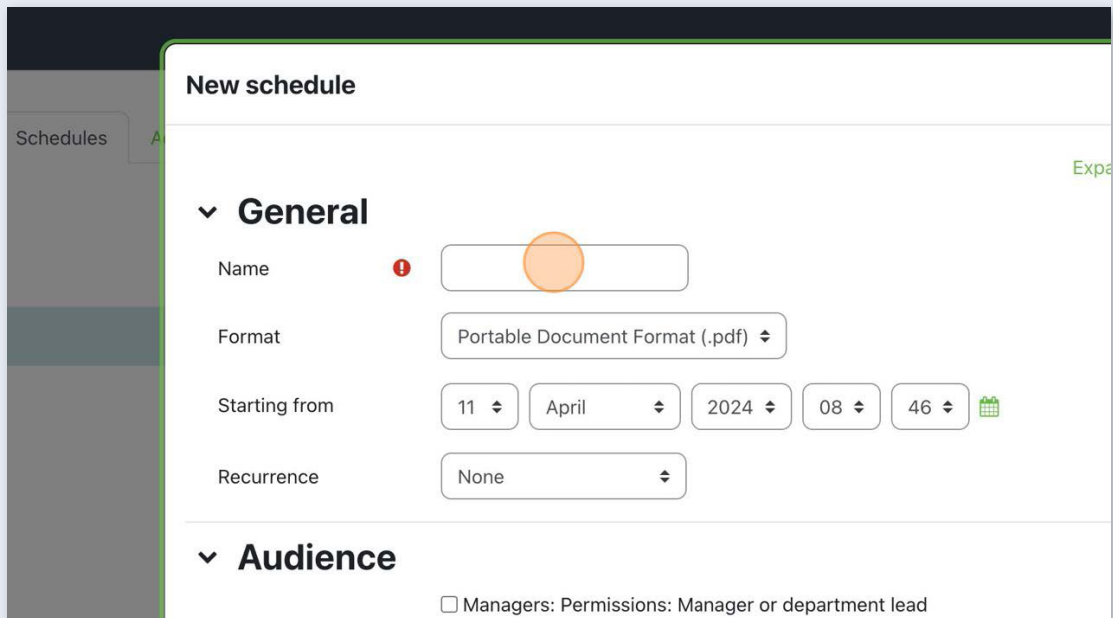
24

Click **New schedule**.



25

Create a name for your schedule.



26

Select the format for the report. Let's select **Comma separated values (.csv)**.

New schedule ×

[Expand all](#)

General

Name ! Monthly

Format Portable Document Format (.pdf) ▾

Starting from 11 ▾ April ▾ 2024 ▾ 08 ▾ 46 ▾

Recurrence None ▾

Audience

Managers: Permissions: Manager or department lead

27

Select the start date for the schedule.

General

Name ! Monthly

Format Comma separated values (.csv) ▾

Starting from 11 ▾ April ▾ 2024 ▾ 08 ▾ 46 ▾

Recurrence None ▾

Audience

Managers: Permissions: Manager or department lead

Message content

28

Under **Recurrence**, we can select how often the report runs. In our case, we want the report to run monthly, so we will select **Monthly**.

The screenshot shows a configuration form with three main sections: **General**, **Audience**, and **Message content**. In the **General** section, the **Name** field is set to "Monthly" with a red warning icon. The **Format** is "Comma separated values (.csv)". The **Starting from** date is set to "1 May 2024 08:46" with a calendar icon. The **Recurrence** dropdown is currently set to "None" and is highlighted with an orange circle. In the **Audience** section, there is a checkbox labeled "Managers: Permissions: Manager or department lead" which is currently unchecked. The **Message content** section has a **Subject** field with a red warning icon.

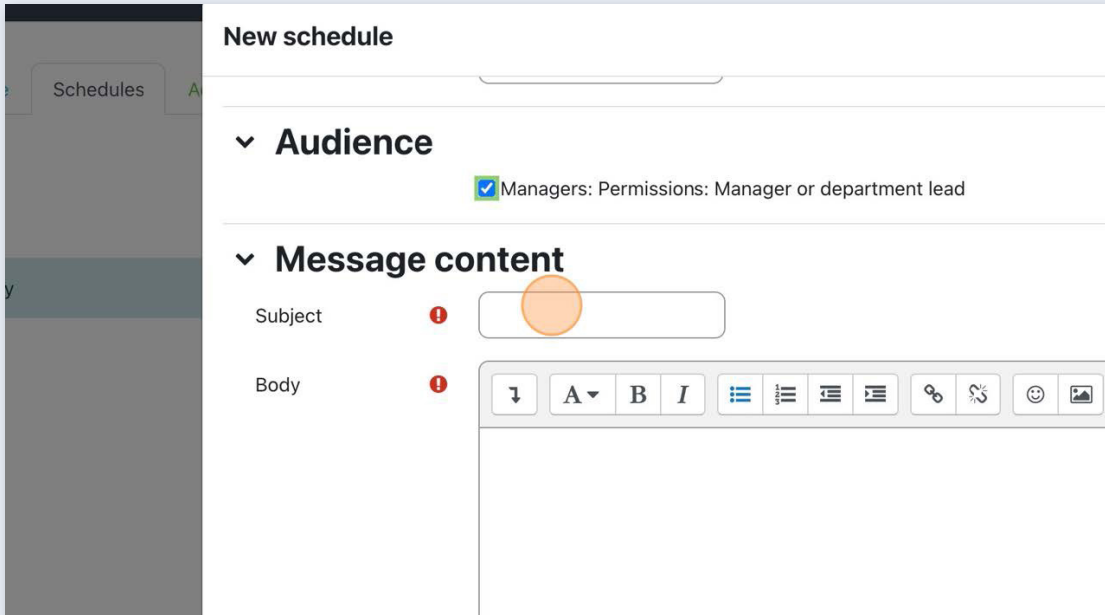
29

Click the **Managers: Permissions: Manager or department lead** lead field.

This screenshot shows the same configuration form as in step 28, but with the **Recurrence** dropdown now set to "Monthly" and highlighted with a green box. In the **Audience** section, the checkbox "Managers: Permissions: Manager or department lead" is now checked and highlighted with an orange circle. The **Message content** section shows the **Subject** field with a red warning icon and the **Body** field with a red warning icon and a rich text editor toolbar.

30

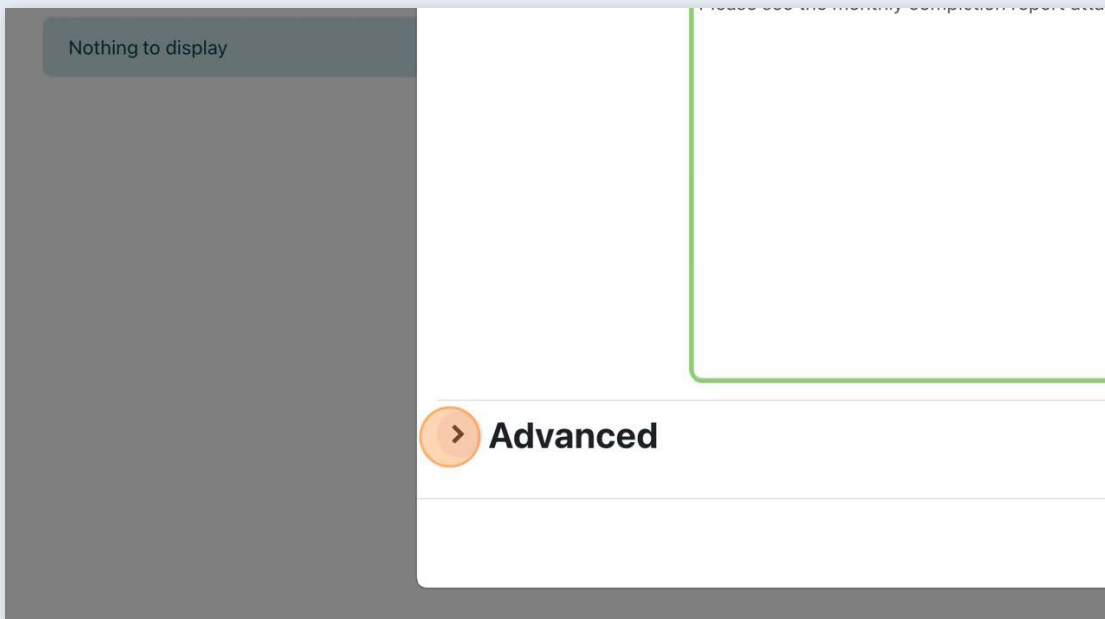
Under **Message content**, let's add some information so the monthly report can be easily identified.



The screenshot shows a 'New schedule' form. On the left is a sidebar with a 'Schedules' menu item. The main form has two sections: 'Audience' and 'Message content'. The 'Audience' section has a checked checkbox for 'Managers: Permissions: Manager or department lead'. The 'Message content' section has a 'Subject' field with an orange circle highlighting it, and a 'Body' field with a rich text editor toolbar containing icons for undo, font size, bold, italic, bulleted list, numbered list, link, unlink, smiley, and image.

31

Open the **Advanced** drop-down menu.



The screenshot shows a sidebar menu with a 'Nothing to display' message at the top. Below the message is a list of menu items. The 'Advanced' item is highlighted with a green border and a right-pointing arrow icon.

32

Here we can select what happens if the report is empty. It might be a good idea to keep this setting as **Send message with empty report** so that you can see if the report is working as intended.

Advanced

If the report is empty Send message with empty report ▾

Required

Cancel Save

33

Click **Save**.

d

y Send message with empty report ▾

Cancel Save