ORACLE® USER PRODUCTIVITY KIT

USAGE TRACKING ADMINISTRATION & REPORTING

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CONTENTS

1. Usage Tracking Administration

Usage Tracking allows an organization to capture data as users view topics in the Player. Administrators can then run usage reports on the tracked data. Several standard reports are provided with the tool, and administrators can also create custom reports to capture the data they need.

Usage tracking has almost no impact on the users who are viewing content and taking assessments. Depending on the configuration of the Usage Tracking Administration tool, a user might need to log in to the Player.

The Usage Tracking tool tracks and stores the following information in the database:

- User name
- Topic name and document ID
- Start and end dates and times and duration for each topic view
- Topic launch count
- Playback mode(s) for each topic
- Required score, achieved score, and calculation of pass/fail for Know It? mode

Identify Users

For data to be tracked, the Usage Tracking Administration tool must be able to identify the users who are viewing content, as well as users who have rights to access the Usage Tracking Administration tool. This is called authentication. There are two possible methods of authenticating a user: Forms and Windows.

Forms Authentication

This authentication method uses entries in the Usage Tracking database to validate users. The user is required to enter his or her user name and password to log in. An option is available that allows the users to save their login information so that they do not have to reenter it each time they access the content.

With Forms authentication, administrators with the appropriate permissions can add, edit, and delete user accounts, as well as remove tracking data.

Windows Authentication

This authentication method uses network login information. Therefore, any user who is logged in to the system is automatically signed in to Usage Tracking. If a user is not logged in with network information, he or she will be prompted to enter his or her network user name and password to access Usage Tracking.

Windows authentication also affects the possible options an administrator has for user maintenance. Because Usage Tracking cannot be used to add, edit, or delete Windows user accounts, administrative users under Windows authentication are able only to remove the data stored in the database, that is, the usage records.

Log in

Users with appropriate permissions can launch the Usage Tracking Administration tool. This tool allows administrators to give users access, set administrative permissions, and edit and run reports.

To access the Usage Tracking Administration tool, you must launch your browser and enter the appropriate URL. If you are using Forms authentication, you must log in. If you are using Windows authentication, you might not have to log in.

The options you have on the Login page vary depending on the settings selected during Usage Tracking configuration. You might have the option to save your user name and password so that you can bypass logging in in the future, or you might have the option to create new users. In addition, your user name might be your e-mail address, and your password might have to exceed a minimum password length.

The URL used to access the Usage Tracking Administration tool must point either to the root of your Usage Tracking server installation or to the admin subfolder within the Usage Tracking server installation directory. If you have admin permissions, either of the above URLs displays the Main Page of the Usage Tracking Administration tool. If you do not have administrative permissions, the first URL launches the Player, whereas the second URL displays a message indicating that you have insufficient permissions.

Main Page

Depending on the authentication method, different options are available from the Main Page. For example, if you are using Forms authentication, the Main Page of the Usage Tracking Administration tool displays links that allow you to edit or run reports; refresh the content outline; add, edit, and delete user accounts; delete usage history; view the Usage Tracking error log; or view a count of active users.

If you are using Windows authentication, you can perform all of the same tasks except for user administration. Specifically, you cannot add or edit user accounts from the Usage Tracking Administration tool, although you can still delete users and their usage histories.

You can also access online help for Usage Tracking and log out when you have finished working. To perform any of these functions, select the desired link from the Main Page.

Note: When new Player content is installed on the Usage Tracking server, the outline should automatically update. However, if the reports do not appear to be synchronized with the content, you can use the Refresh outline link on the Main Page to update the outline with the new content.

Log Out

If you are using Forms authentication, you can use the Logout link on the Main Page to exit the Usage Tracking Administration tool and return to the Login page. If you have saved your user name and password, using the Logout link clears the password, so that you will be prompted to log in again by entering your password when you next launch the Usage Tracking Administration tool.

You can also exit the Usage Tracking Administration tool by simply closing the browser window without logging out. In this case, if you have saved your user name and password, you will be automatically logged in the next time you launch the tool. If you have not saved your user name and password, you do not have to use the Logout link, as you will be prompted to log in every time you launch the Usage Tracking Administration tool.

Note: The User name field on the Login page is populated by default with the user name of the last person to log in on a given computer.

2. Reporting

Users with appropriate rights can use Usage Tracking to create and run training reports. These reports query the database to provide summary statistics. Users can either select the predefined sample reports included with the application or build their own custom reports. It is easy to create custom reports by selecting predefined report groupings, filter criteria, and sort orders. Furthermore, custom reports can be saved, so they can easily be run again.

The predefined sample reports summarize data based on content and user information. Depending on the report, you might be prompted to enter filter criteria, such as a date range or user name(s). Sample reports can be modified or used as the basis for new reports.

Report results are viewed in a browser window and can be printed using the browser's print function. In addition, report data can be copied and pasted into other applications, such as Excel, allowing for further manipulation of the information.

Usage Tracking report options are available from the Main Page of the Usage Tracking Administration tool. From this page, you can open the Report List to run, create, and manage reports.

To access the list of available reports:

1. From the Main Page, click the **Edit/run reports** link.

Report List

The Report List displays the names of the custom and sample reports that you have permission to use. Reports that you have created for your own use are called per-user reports. Per-user reports, marked with an asterisk (*), appear only in your Report List. Global reports, available to all users with appropriate rights, appear in all users' Report Lists. Per-user and global reports are listed together in alphabetical order.

Icons appear next to the names of all per-user, sample, and global reports in the Report List. Using these icons, you can run, modify, and delete the reports. Additional links provide the options to create a new report in design mode, import XML to create a new report, return to the Main Page, and access the Help system.

Note: Any user with permission to run reports can run reports accessing data in the entire Usage Tracking database.

View a Report

You can view a report by clicking the report name or the corresponding View Report icon in the Report List. The results of the report appear in the browser window. If a filter has been applied to a report, you might be prompted to enter filter values before the report appears. If you enter filter values, only data that satisfy the filter are included in the report; if you do not enter filter values, all data are included. When you access a report, a message appears indicating that the report is being processed. Some reports might take more time than others to process.

After viewing a report, you can use the Return to report list link at the top of the report page to close the report and return to the Report List. The Go to report design link opens the report in design view for modifications. You can also use your browser's Back bottom to return to Usage Tracking pages you have already viewed.

Note: You can view reports while others are using the Usage Tracking system.

To view a report:

1. From the Main Page of the Usage Tracking tool, click the **Edit/run reports** link to open the Report List.
2. In the row listing the report you want to view, click **View report**.

   You can also click the name of the report in the Report Name column of the Report List.
3. If prompted to enter filter criteria, enter the appropriate criteria and click **OK**.

   You can also click OK without entering filter criteria to view the report including all data.

View Report Details

Each report provides a listing of summary statistics on the use of your content. After running a report, you might want to view the detailed data behind the statistics.

Selecting Details next to a report row displays the Selected Details page with a table of all of the records that were used to produce the summary statistics. Selected Details views are sorted by date and can be sorted in ascending or descending order. By default, 100 records are listed per page, but you can change this value. Regardless of the report, the Selected Details view always shows the same set of data, as follows:

- Date and time at which the topic was launched
- Topic name and document ID
- User
- Time spent viewing the topic
- Playback mode in which the topic was viewed
- Score obtained in Know It? mode, if applicable
- Whether user passed Know It? mode

Details are available on a per-record basis and show the raw data from each time a topic was launched. Therefore, if the same user takes Know It? mode three times, a separate row is included for each instance of Know It? mode.

Note: You can print the Selected Details pages using the print function in your browser, but each screen page must be printed separately. A screen page might print on several physical pages. In general, it is recommended that you print report pages using landscape page orientation. You can not modify report details.

To view report details:

1. Open the Report List and run a report.

2. Click **Details** at the end of the summary row whose details you want to view.
3. To change the sort order, click the **Sort by date** field and select the desired sort order.
4. To change the number of records on a page, select the text in the **Records per page** field and type a number.
5. Click **OK** to apply the changes.
6. If there are more records than can be displayed on one page, use the **Previous page** and **Next page** links to scroll through the detail pages.
7. Click the **Return to report** link to redisplay the report.

Modify a Report

Users with rights to create reports can also modify them. For example, you might want to modify a report to apply a different type of filter or to show a different set of data. After making the changes in the design form, you can save the report, overwriting the original with your changes, or you can save the report with a new name to create a new report.

To modify a report:

1. Open the Report List.
2. In the row listing the report you want to modify, click **Modify report**.
3. Make the desired changes.
4. Click **Save**.

   You can also click Save As to create a new report and leave the original report unchanged.

Note: You can also modify a report when you are viewing it in the browser by clicking the Go to report design link.

Save a Report with a New Name

You can create a copy of any report by saving it with a new name. This allows you to use an existing report as the basis for a new report and still keep the original report. You can create a copy of the report from the Report Design page by using the Save As button and entering a new name for the copy.

Note: It is a good idea to save backup copies with different names for the predefined sample reports that you use. This prevents your versions from being overwritten when new sample reports are issued.

To save a report with a new name:

1. Open the Report List.
2. In the row listing the report you want to save with a new name, click **Modify report**.
3. Click the **Save As** button.
4. In the **Save as** field, type a new name for the report.

5. Click the **Save As** button.

Delete a Report

Any user who can create reports can delete them. After report deletion is confirmed, the view refreshes, and the report no longer appears in the Report List. The deleted report is removed from the database and from all views. Predefined sample reports can also be deleted from the Report List.

Although you can delete the sample reports, new versions of the Usage Tracking tool might reinstall the reports, in which case they will need to be deleted again.

Warning! Delete reports with caution, as you cannot undo deletion of a report.

To delete a report:

1. Open the Report List.
2. In the row listing the report you want to delete, click **Delete report**.
3. Click **OK**.

Refresh the Outline

When new Player content is installed on the Usage Tracking server, the outline should automatically update. However, if the reports do not appear to be synchronized with the content, you can use the Refresh outline link on the Main Page to update the outline with the new content.

To refresh the outline:

1. From the Main Page, click the **Refresh outline** link.

3. Filtered Reports

You can create reports with filters, which limit the reporting data to specific values, such as a specific outline or date range. Depending on your reporting needs, you can specify a fixed and unchangeable filter value, or you can set the report to prompt the user for filter values each time it is viewed. For example, you could create a report that always shows data for a certain playback mode or outline section or a report that allows users to enter a varying date range. If a report is set to prompt the user for filter values, the Report Data page opens displaying fields in which the parameter values can be set. Parameter selections can include a date range, one or more user names, an outline item, or a playback mode.

A single report can include multiple filters. If no values are selected for a filter, the report is processed using all data. For example, if you enter only a user name and no date range for a report that filters on both user names and dates, the report will include data from all dates in the database when gathering information about the specified user(s).

Note: The message "No data to report" appears if no data are available for the specified parameter values. However, you can use your browser's Back button to return to the Report Data page, change your parameter values, and rerun the report, if desired.

Warning! Although you do not need to enter filter values when running a filtered report, doing so can cause a problem if you are viewing a formatted report with a large amount of data.

Date Range Filter

When a Date range filter is applied to a report, the Report Data page opens allowing you to enter date range values. You can enter a complete date range or a single beginning or ending date. Entering dates in the From and To fields limits the report to information between, and including, those dates. Entering a From date only gathers data from that date to the present date. Conversely, entering a To date only reports on all data up to and including the entered date. If you omit both beginning and ending dates, the entire database is used for the report.

You can type dates directly in the To and From fields, or you can use the corresponding calendar controls. If you type a date, use the regional format appropriate for your locale (where the locale is selected during Usage Tracking configuration). An error message will be displayed if you enter an invalid date, and you will be prompted to use the calendar control to select an appropriate date.

You can also specify times in the date filters, using a 24-hour format or the format appropriate for your locale. Times must include hours and minutes and can include seconds, if desired, in the format 12:34:5. The 24-hour clock ranges from 0:00:00 for 12:00:00 AM to 23:59:59 for 11:59:59 PM. If no time is entered in the date filter, 12:00 AM is the default time assigned to the start date, and 11:59:59 PM is the default time assigned to the end date.

Note: Depending on the report design, the selected date range can be included at the top of the report.

To apply a date range filter:

1. Open the Report List and run a report that prompts you to filter for dates.

2. On the Report Data page, enter a starting date in the **From** field, if desired.

   You can also select the starting date using the calendar control.

3. Enter an ending date in the **To** field, if desired.

   You can also select the ending date using the calendar control.

4. Click **OK**.

User Names Filter

Reports can be filtered to display information for one or more specific users. When a report is filtered for user names, you can type the name(s) in the User names field or use the Find users link to select users. If you are using Forms authentication, you must enter the user name exactly as it exists in the Usage Tracking database. If you are using Windows authentication, you must enter fully qualified user names (including the domain name). If you are using anonymous authentication, you cannot filter by user name, as all user information is combined under the user name "anonymous".

Note: Depending on the report design, the selected user names can be included at the top of the report.

To apply a user names filter:

1. Open the Report List and run a report that prompts you to filter for user names.
2. On the Report Data page, type the user names in the **User names** field and/or search for user names using the **Find users** link.

   If you are using Forms authentication, you must enter the user name exactly as it exists in the Usage Tracking database. If you are using Windows authentication, you must enter fully qualified user names (including the domain name). If you are using anonymous authentication, you cannot filter by user name, as all user information is combined under the user name "anonymous".

3. Click **OK**.

Search for User Names

When running a report that filters for user names, you can use the Find users link to select user names rather than typing them in. The Find Users page consists of two panes, the Search pane and the Search Results pane. The options in the Search pane allow you to search for user names that contain or start with specific characters. By default, 10 user names are returned, but you can change this number. For example, you can restrict the search to find only 5 users or expand it to find 30 users.

The search returns an alphabetical list of user names that satisfy the search criteria. If the number of such user names exceeds the specified number of search results, this list is truncated as needed. To include more user names in the search results, you can rerun the search using a larger number of search results.

The results of a search appear in the Matched User Names field in the Search Results pane. You can then select the user names you want to include in the report and add them to the Selected User Names field. In addition, you can repeat the search using different criteria, to select additional users to include in the report.

Note: You can search for all user names by leaving the search characters field blank. Users for which no tracking data exist are not included in the search results.

To search for user names:

1. Open the Report List and run a report that prompts you to filter for user names.
2. On the Report Data page, click the **Find users** link.
3. In the Search pane, set the search criteria.

   If desired, click next to **Search for names that** and select the **start with** or **contain** option.

   If desired, enter one or more characters in the search field.

   If desired, enter a number in the **Number of search results** field.
4. Click **Search**.
5. In the **Matched User Names** field in the Search Results pane, select the checkboxes next to the user names you want to include in the report.
6. Click **Add to list** to add these names to the **Selected User Names** field.
7. Click **OK**.
8. Click **OK**.

Note: You can repeat steps 3-6 to search for additional user names to add to the same report.

Outline Item Filter

When you run a report that can filter data by outline item, the Report Data page opens allowing you to select the desired outline item. The Find outline item link opens the Find Outline Item page with an outline of all of your content listed in hierarchical order. You can expand and contract outline sections as needed to display or hide subordinate levels. Reports can be filtered for an entire module, a section, or just a single topic. If you do not select an outline item, the report will include data for the entire outline.

You can use the Clear link on the Report Data page to clear the current outline item if you wish to remove the filter from the report. If you wish to select a different outline item, you can simply click the Find outline item link again; you do not need to clear the current selection first.

Note: Depending on the report design, the name of the selected outline item can be included at the top of the report.

To apply an outline item filter:

1. Select a report that prompts you to filter for an outline item.
2. On the Report Data page, click the **Find outline item** link.
3. Navigate the outline to find the outline item you want to include in the report.

   Click ⊞ next to the modules and sections you want to expand and ⊟ next to the modules and sections you want to collapse.
4. Select the desired outline item. You can select a single module, section, or topic.
5. Click **OK**.
6. Click **OK**.

Playback Mode Filter

Reports can be filtered to display data for all playback modes or a single mode.

Note: Depending on the report design, the selected playback mode can be included at the top of the report.

To apply a playback mode filter:

1. Select a report that prompts you to filter for a playback mode.
2. On the Report Data page, click next to **Playback mode**.
3. Select a playback mode option.
4. Click **OK**.

Report Format

Although most reports display with a specific format applied, for some reports, you might be prompted to select a format when you run them. Reports can be viewed in the following three formats:

Format	Description
Formatted	Formatted reports are created using a style sheet, which produces an HTML output. The cascading style sheets (.css files) used to format Usage Tracking reports are saved in the styles subfolder of the installation folder.
XML	The XML format displays the report data using the schema supplied with the Usage Tracking tool.
Tab-delimited	Tab-delimited reports display the data in columns separated by tabs. In a formatted report, identical items are grouped together and only appear once. In tab-delimited report, each row contains the full set of data, including the row headings.

Note: After viewing a formatted report, you can use the links at the top of the report page to return to the Report List or Design Report page. After viewing an XML or tab-delimited report, you can use your browser's Back button to return to Usage Tracking pages you have already viewed.

You can use the File menu and the Save As command to save a report as a text file. You can then open the file in any application that opens or imports tab-delimited text files. You can cut and paste the tab-delimited data from your browser into another application, such as Excel, for further data manipulation.

To apply a report format:

1. Open the Report List and run a report that prompts you to select a report format.
2. On the Report Data page, click next to **Format**.
3. Select a format option.
4. Click **OK**.

4. Design New Reports

Users with the appropriate permissions can create new reports. You create or modify reports using a design form called the Design Report page. When you create a new report, you start with a blank design form.

The design form consists of the following six sections:

Section	Description
Reports	Allows you to name the report and specify its availability
Groupings	Allows you to select the information to be included in the report and how the information should be grouped. This section determines the rows that appear in the report.
Data	Allows you to select the statistical columns to be included in the report
Filters	Allows you to select the filters that can be applied to the report
Format	Allows you to select a format for the report
Options	Allows you to include the data tracked for content that has been deleted

Note: You can not modify the details page of any report.

After making initial selections for each component of the report, you can use the View this report link to see the resulting data. You can then return to the report design and add or modify the components until you are satisfied with the report design. At any point while you are designing a report, you can save the report, save the report with a new name, or export the report in XML format.

Note: You must enter at least one statistic column to be able to preview a report.

Create a New Report

When you first open the design form to create a new report, each of the sections Groupings, Data, and Filters contains only one row for defining the report contents. As you add content to these sections, additional rows appear allowing you to include additional values, if desired. The options available for report groupings, column headings, and filter parameters are predefined and cannot be changed.

To create a new report:

1. Open the Report List.
2. Click the **New Report** link.
3. Name the report.
4. Add report groups.
5. Add data columns.
6. If desired, apply one or more filters.
7. Select the report format.

8. If desired, select the report option to include data from deleted topics.
9. Save the report.

Name a Report

When you create a new report, you must first provide a name for it. Report names must be unique by type. That is, you cannot name a per-user report with the same name as another per-user report in your Report List. Similarly, you cannot name a global report with the same name as another global report. You can have two reports with the same name only if one is a per-user report and the other is a global report.

By default, each new report is created on a per-user basis and is available only to the report creator. Selecting the Make this report available to everyone option creates a global report available to all users with appropriate permissions. Anyone with permission to create reports can create or modify a global report. The Report List does not indicate the name of the user who created a global report.

Note: Per-user reports appear with an asterisk (*) next to the report name in the Report List.

To name a report:

1. In the **Reports** section of the Design Report page, type a name for the report in the **Name** field.
2. If desired, select the **Make this report available to everyone** checkbox to make the report a global report.

Add Report Groups

Groups indicate how the report data should be organized. Adding a group creates a row heading for each value in the group. For example, if you group a report on user names, a separate row appears for each user. You can organize your report data using the following groups:

Group	Description
Outline	Outlines define the organization of the content. Grouping on the outline creates a heading for each item in the outline, including modules, sections, and topics. Outline items are always listed in hierarchical order according to their positions within the outline.
Topic	Topics are the lowest level of grouping in the outline structure and supply the recorded steps for completing each task. Grouping on topics creates a heading for each topic in your content.
User name	Grouping on user name shows a breakdown of content usage by user. Each user's data are summarized in one section, with a new section created for each user. Users with no data are not included in the report.
Playback mode	Each time a user launches a topic, he or she selects a playback mode in which to view it. Grouping on playback mode allows you to see how your users are choosing to learn your content.

Reports can contain more than one grouping. After you select the first group, a second row appears in the Groupings section. If you add multiple groups to the report, there will be multiple levels of headings. For instance, if you group by User name and then by Topic, you will see a primary heading row for each user with subcategory heading rows under each user for the topics he or she viewed. The order in which you add new groups determines how the report is organized.

Note: You cannot group by both outline and topic at the same time.

After you select a grouping, you can select an option to control the display of the information in the report. For the Topic, User name, and Playback mode groupings, you can specify the sort order as Ascending, Descending, or None. If you select the Ascending or Descending option, the group headings are listed alphabetically. If you select the None option, the group headings are listed in the order in which they appear in the database. When you include multiple groupings in your report, the overall sorting order is determined by the order in which the groupings appear. To make a field the primary sort, select it as the first grouped field. For instance, in the above example, the data are sorted first by user name and then by topic. If the order of the two groupings were reversed, you would see a row heading for each topic with subcategory heading rows under each topic for the users who viewed that topic.

When you group by outline, the results are always displayed in hierarchical outline order. By default, all items at all levels in the outline are included, even those for which no data exist. However, you can also choose to limit the report to include data on only the top few levels of the outline. The available level options are Full outline (default), Primary, Level 1, Level 2, Level 3, and Level 4. If you select the Primary option, the report includes summary data only for the top level of each outline in your content. The primary level document in an outline provides the name of the outline and is equivalent to level 0. If you select the Level 1 option, the report includes summary data for all of the documents that appear at the first level in the outline, in addition to the primary level data. Similarly, selecting the Level 2 option includes data for all of the documents appearing at the second and higher levels in the outline, and likewise for Level 3 and Level 4. Documents appearing at each level can include any combination of modules, sections, and topics, depending on how your content is organized.

Note: Usage Tracking reports data only down to the topic level; it does not track content usage at the frame level.

To add a report group:

1. In the **Groupings** section of the Design Report page, click next to **(Select a group to add)** in the **Groups** column.
2. Select the first field on which you want to group.
3. If applicable, click next to **Ascending** in the **Sort** column.
4. Select the desired sort option as **None**, **Ascending**, or **Descending**.
5. If applicable, click next to **Full outline** in the **Level** column.
6. Select the desired display level as **Full outline**, **Primary**, **Level 1**, **Level 2**, **Level 3**, or **Level 4**.

   If desired, you can repeat steps 1-6 in subsequent rows in the Groups column to add up to two additional groupings to the report.

Remove a Group from a Report

If your reporting needs change, you might need to remove a grouping from a report. When you remove a grouping from the Design Report page, the view refreshes, and the group row no longer appears in the design form.

To remove a group from a report:

1. In the **Groupings** section of the Design Report page, click in the **Groups** column next to the group you want to remove.
2. Select **(Remove this group)**.

Add Data Columns to a Report

When designing a report, you can select the type of statistical data you want to include. Each statistic value is displayed in a column in the report. The statistics appear in columns from left to right in the same order in which they are selected in the design form. After you select a statistic column to include in the report, a new blank row appears in the Data section allowing for additional columns to be selected. Note that each statistic column included in a report must be unique; that is, you cannot select the same statistic column more than once. Therefore, you can include up to nine types of statistic columns in each report.

The available statistic columns are as follows:

Statistic	Description
View count	Number of times a topic was launched, by any user and in any playback mode For example, if a single user plays the same topic in See It! mode three times, the View count is 3. If one user views a topic in See It! and a second user views the same topic in Try It! mode, the View count is 2.
Know It count	Number of times a topic was launched in Know It? mode and taken to completion If a user completes Know It? mode for the same topic three times, the Know It count is 3.
View time average	Average amount of time (in hours, minutes, and seconds) that users have spent viewing a topic, in any playback mode
Total time	Total amount of time (in hours, minutes, and seconds) that users have spent viewing a topic, in any playback mode
Average score	Average Know It? score. Depending on the groupings selected, this score can be averaged by outline item, topic, or user.
Maximum score	Highest Know It? score Depending on the groupings selected, this score can be highest obtained for all topics in a module or section, for a single topic, or for a user.
Minimum score	Lowest Know It? score Depending on the groupings selected, this score can be lowest obtained for all topics in a module or section, for a single topic, or for a user.

Statistic	Description
Pass percentage	Percentage of passing Know It? scores If a user completes Know It? mode for the same topic five times and passes only once, each attempt is included in the calculation of this percentage, and the value for the Pass percentage is 20%. If three users complete Know It? mode for the same topic one time each and two pass, the Pass percentage is 66.7%.
Pass count	Total number of times the required score was achieved for a topic in Know It? mode If one user completes Know It? mode for the same topic five times and passes once, the Pass count is 1. If three users complete Know It? mode for the same topic one time each and two pass, the Pass count is 2.

Note: Tracked data are based on a user launching a topic in a playback mode. User completion of a topic is not tracked, except for Know It? mode.

Sort Data Columns

After selecting a statistical column, you can select a sorting option as Ascending, Descending, or None. If you select the Ascending or Descending option, the data are listed in numerical order. If you select the None option, the data are listed in the order in which they appear in the database. Sorts are applied in the order in which the statistic columns appear and after any sorts that have been applied to report groupings.

Breakout by Mode

The Breakout by mode option determines whether the data are reported as a summary statistic for all playback modes or a summary for each individual playback mode. Selecting breakout by mode displays a separate column for each playback mode. The Breakout by mode option is available only for those statistics that apply to all playback modes, namely, View count, View time average, and Total time. The other statistics apply only to data for Know It? mode.

Note: Breakout by mode displays a column for each playback mode, whether there are data for the playback mode or not. You can limit the data columns in the report to a single playback mode by deselecting the Breakout by mode option and instead applying a playback mode filter.

To add data columns to a report:

1. In the **Data** section of the Design Report page, click next to **(Select a column to add)** in the **Statistic columns** column.
2. Select the statistic column you want to add to the report.
3. If desired, click next to **None** in the **Sort** column.
4. Select the desired sort option as **None**, **Ascending**, or **Descending**.
5. If applicable, select the **Breakout by mode** option to display a statistic column for each playback mode.

   If desired, you can repeat steps 1-5 in subsequent rows in the Statistic columns column to add up to three additional filters to the report.

Remove a Data Column from a Report

If your reporting needs change, you might need to remove a statistic column from a report. When you remove a statistic column from the Design Report page, the view refreshes, and the statistic column row no longer appears in the design form.

To remove a data column from a report:

1. In the **Data** section of the Design Report page, click in the **Statistic columns** column next to the data column you want to remove.
2. Select **(Remove this field)**.

Preview a Report

You can preview a report while you are creating it. This is helpful in determining whether the design selections you are making will yield the desired results.

After making initial selections for each component of the report, you can use the View this report link to see the resulting data. You can then return to the report design and add or modify the components until you are satisfied with the report design. At any point while you are designing a report, you can save the report, save the report with a new name, or export the report in XML format.

Note: You must enter at least one statistic column to be able to preview a report.

To preview a report:

1. From the Design Report page, click the **View this report** link.
2. To return to the Design Report page and continue working on the report, click the **Go to report design** link.

Save a New Report

After naming a report and selecting at least one statistic column, you can save the report to the Report List. As you continue to build and modify the report, you should periodically save your changes. The Save button saves the changes and overwrites the existing version of the report. The report remains open after it is saved.

The Save As button allows you to make a copy of a report by saving it with another name. After clicking Save As, you are prompted to enter a new name for the new copy of the report. The new copy of the report remains open after it is saved.

Note: If you have selected the Make this report available to everyone option, other users will see the report as soon as you save it for the first time.

Warning! An error message appears if you try to save a report using the same name as an existing report with the same availability (per-user or global). In this case, you must enter a new name for the report or click Cancel to return to the Design Report page.

To save a new report:

1. From the Design Report page, click **Save**.

Select Report Filters

After establishing the basic design of a report by selecting report groupings and data columns, you might wish to apply one or more filters to the report. Report filters allow you to view only a subset of the report data by hiding the information you do not want to see. For example, you can filter a user name report so that only the information about a particular user appears.

Note: When you filter a report, all reported averages and totals are based solely on the data that are included in the report.

You can filter data on the following four parameters:

Filter	Description
Date range	Allows you to show data for a specific time interval
User names	Allows you to show data for one or more specific users
Outline item	Allows you to show data for a specific module, section, or topic
Playback mode	Allows you to show data for all playback modes or a single playback mode

You can apply more than one filter to a report. For example, you can add a User names filter to display statistics for a specific group of users, such as a department, and also add a Date range filter that prompts you to enter a date range when you run the report.

After you apply a filter, you can select among the following options for that filter:

Option	Description
Persistence	Determines whether default values are always used for the filter or users are able to set the filter values when they run the report If you want to use the same filter values every time you run the report, enter the default values for the parameter and set the Persistence option to Save. The report will automatically run using those values without prompting the user to select a filter value. For example, if you select a User name filter and enter the user names for a certain department, only data for those users will be included every time the report is viewed. If you want to allow the filter values to be changed each time the report is viewed, set the Persistence value to Ask. In this case, when you run a report with a Date range filter, you can enter different starting and ending dates each time you run the report. Another option is to set the Persistence value to Ask, but also enter common default values for the filter. This combination of options allows you to quickly run a report with commonly used default values, but also provides the flexibility to enter new filter criteria if needed.
Include in report	Prints the selected filter values above the report columns, to clearly identify the range of data included in a report

Option	Description
Default value	Value(s) used for a filter each time the report is viewed The values in this column change, depending on the selected parameter. For instance, the default values for a Date range filter can include a specific beginning date and a specific ending date, whereas the default value for an Outline item can be a single module, section, or topic. If the Persistence value (see above) is set to Save, the report will always use the default value(s) when it is run. If the Persistence value is set to Ask, users will be able to change the filter values each time they run the report.

To select a report filter:

1. In the **Filters** section of the Design Report page, click next to **(Select a parameter to add)** in the **Parameters** column.
2. Select the desired parameter.
3. If desired, click next to **Ask** in the **Persistence** column.
4. Select **Ask** to prompt the user to enter filter values or **Save** to save the default filter values.
5. If desired, click the **Include in report** checkbox to display the filter values at the top of the report.
6. If desired, enter default value(s) in the **Default value** column.

   You should always enter default value(s) for a filter if its Persistence value is set to Save. Otherwise, the report will, in effect, be unfiltered.

   If desired, you can repeat steps 1-6 in subsequent rows in the Parameters column to add up to three additional filters to the report.

Set Default Values for Report Filters

Once you have selected a filter for a report, you can set default values for the filter. The process for setting defaults varies depending on the type of filter applied.

If you set the Persistence of a filter to Save, the report automatically with the default filter values. Setting the persistence to Ask allows users to enter different filter values each time they run the report.

Default Values for a Date Range Filter

When you apply a Date range filter, the Default value column displays From and To fields where you can enter starting and ending dates for the report data. You can enter a complete date range or a single beginning or ending date. Entering dates in the From and To fields limits the report to information between, and including, those dates. Entering a From date only gathers data from that date to the present date. Conversely, entering a To date only reports on all data up to and including the entered date. If you omit both beginning and ending dates, the entire database is used for the report.

You can type dates directly in the To and From fields, or you can use the corresponding calendar controls. If you type a date, use the regional format appropriate for your locale (where the locale is selected during Usage Tracking configuration). An error message will be displayed if you enter an invalid date, and you will be prompted to use the calendar control to select an appropriate date.

You can also specify times in the date filters, using a 24-hour format or the format appropriate for your locale. Times must include hours and minutes and can include seconds, if desired, in the format 12:34:5. The 24-hour clock ranges from 0:00:00 for 12:00:00 AM to 23:59:59 for 11:59:59 PM. If no time is entered in the date filter, 12:00 AM is the default time assigned to the start date, and 11:59:59 PM is the default time assigned to the end date.

Default Values for a User Names Filter

When you apply a User names filter, the Default value column displays a field in which you can enter one or more specific user names. If you are using Forms authentication, you must enter the user name exactly as it exists in the Usage Tracking database. If you are using Windows authentication, you must enter fully qualified user names (including the domain name). If you are using anonymous authentication, you cannot filter by user name, as all user information is combined under the user name “anonymous”.

Alternatively, you can use the Find users link to select user names rather than typing them in.

The Find Users page consists of two panes, the Search pane and the Search Results pane. The options in the Search pane allow you to search for user names that contain or start with specific characters. By default, 10 user names are returned, but you can change this number. For example, you can restrict the search to find only 5 users or expand it to find 30 users.

The search returns an alphabetical list of user names that satisfy the search criteria. If the number of such user names exceeds the specified number of search results, this list is truncated as needed. To include more user names in the search results, you can rerun the search using a larger number of search results.

The results of a search appear in the Matched User Names field in the Search Results pane. You can then select the user names you want to include in the report and add them to the Selected User Names field. In addition, you can repeat the search using different criteria, to select additional users to include in the report.

Note: You can search for all user names by leaving the search characters field blank. Users for which no tracking data exist are not included in the search results.

Default Values for an Outline Item Filter

When you apply an Outline item filter, the Default value column displays a Find outline item link with which you can select a specific module, section, or topic. The Find outline item link opens the Find Outline Item page with an outline of all of your content listed in hierarchical order. You can expand and contract outline sections as needed to display or hide subordinate levels. Reports can be filtered for an entire module, a section, or just a single topic.

You can use the Clear link to clear the current outline item if you wish to remove the default value from the report. If you wish to select a different outline item, you can simply click the Find outline item link again; you do not need to clear the current selection first.

Default Values for a Playback Mode Filter

When you apply a Playback mode filter, the Default value column displays a drop-down list from which you can select All modes or a single playback mode.

Format a Report

You can save a report with a specific format or allow users to choose a format when they run the report. Reports can be viewed in the following three formats:

Format	Description
Formatted	Formatted reports are created using a style sheet, which produces an HTML output. The cascading style sheets (.css files) used to format Usage Tracking reports are saved in the styles subfolder of the installation folder.
XML	The XML format displays the report data using the schema supplied with the Usage Tracking tool.
Tab-delimited	Tab-delimited reports display the data in columns separated by tabs. In a formatted report, identical items are grouped together and only appear once. In tab-delimited report, each row contains the full set of data, including the row headings.

Note: After viewing a formatted report, you can use the links at the top of the report page to return to the Report List or Design Report page. After viewing an XML or tab-delimited report, you can use your browser's Back button to return to Usage Tracking pages you have already viewed.

Set Persistence for Report Format

If you set the Persistence value of the format option to Save, the report will always be generated in the same format. Setting the Persistence value to Ask allows users to select a different format each time they run the report.

To format a report:

1. In the **Format** section of the Design Report page, click next to **Formatted** in the **Format** column.
2. Select a format.
3. If desired, click next to **Save** in the **Persistence** column.
4. Select **Ask** to prompt the user to select the report format or **Save** to always run the report with the selected report format.

Report Options

In general, tracking reports include data only from current content. However, you might also have tracking data for topics that have been deleted. If you want to include data for deleted topics in a report, select the Include deleted topics option in the report design form.

To include data for deleted topics in a report:

1. In the **Options** section of the Design Report page, click the **Include deleted topics that have tracking data** checkbox.

5. Export and Import Reports

You can exchange reports between Usage Tracking installations using export and import. For example, you might want to share a personal report with other users without making the report a global report. Usage Tracking reports are exported and imported in XML format.

To exchange reports using export and import, first export the report structure from Usage Tracking, copying and pasting the XML into an application such as Notepad, and saving the file as a text file. Then, send this file to another user, who can open Notepad, copy the text, and use the Import Report link on the Report List page to paste the copied text and create a new report.

Export a Report

You can export the XML for the structure of a report using the Export Report button in the Design Report page. When you export a report, the XML for the report structure appears in a textbox in the Report Data page. You can copy and paste the XML or save the XML as a file using the Save command from your browser's File menu.

To export a report structure:

1. Open the Report List.
2. Click **Modify report** for the report you want to export.
3. Click **Export Report**.
4. On the Report Export page, right-click in the textbox and select the **Select All** command.
5. Right-click in the textbox and select the **Copy** command.
6. Click **OK**.
7. Open the application where you want to paste the XML, such as Notepad, and paste it.
8. Save the file containing the exported XML.

Import a Report

Pre-existing reports in XML format can be imported into the Usage Tracking system. You import a report by first copying the XML from the report you want to import and then using the Import Report link, located on the Report List page, to open the Report Import page where you can paste the copied text. When you import this XML, the Design Report page opens allowing you to make modifications to or save the imported report. By default, the report uses the same name and availability (per-user or global) as the original report. However, you can change the name or other elements of the report as needed.

The import process validates the XML to ensure that it matches Usage Tracking report requirements. An error message appears if the XML cannot be validated.

Once a report is imported, it is treated like any other report and can be edited or deleted as desired.

To import a report:

1. Open the file containing the XML for the report you want to import.

2. Select the XML you want to copy.
3. Copy the XML.
4. Open the Report List page in Usage Tracking.
5. Click the **Import Report** link.
6. On the Report Import page, right-click in the textbox and select the **Paste** command.
7. Click **OK**.
8. If desired, enter a new report name in the **Name** field.
9. If desired, make any necessary changes to the report structure.
10. Click **Save**.

6. User Administration

When a user tries to access Usage Tracking to play content or view reports, the system must be able to validate the user. If you are using Windows authentication, this validation is handled by IIS (the Web server). If you are using Forms authentication, the user names must be stored in the Usage Tracking database.

Therefore, if you are using Forms authentication and have the appropriate permissions, you can perform various user administration functions such as adding a new user, editing an existing user, and deleting a user and his or her usage history. If you are using Windows authentication, the only user administration tasks you can perform are deleting users and usage history.

Add a New User

If you are using Forms authentication and have the appropriate permissions, you can add new users to Usage Tracking. User names must be unique in the system. If you try to create a new user with the same name as an existing user, you will receive an error message. User names are not case sensitive; however, passwords are case sensitive.

Note: Users can create their own accounts and password if the Allow users to create their own account option is enabled during Usage Tracking configuration.

If you have the rights to set administrative permissions, you can assign the following four access rights to a new user:

Permission	Rights
Add users	User can add and edit users
Run reports	User can view reports, edit reports, create new reports, and refresh the outline
Delete user and tracking data	User can delete users (if available) and purge tracking data for users
Set administrative permissions	User can set or change permissions

Note: If you are using Windows authentication, you set administrative access through the Usage Tracking configuration page. From this page, you can give the appropriate permissions to delete data and/or run reports to Windows users or user groups.

To add a new user:

1. From the Main Page, click the **Add new user** link.
2. Enter the new user's name in the **User name** field.
3. Enter a password in the **Password** field.
4. Enter the same password in the **Confirm password** field.
5. Select the appropriate options in the **Administrative Permissions** section, if applicable.
6. Click **Save**.

Edit an Existing User

If you are using Forms authentication and have the appropriate permissions, you can edit the information for a user. This allows you to correct misspellings in the user's name or change a password that someone might have forgotten. It also allows you to change a user's status from active to inactive or back again. If a user is inactive, the user name and password remain in the database, but the user is prevented from accessing the software.

When you click the Edit existing user link, a page appears that allows you to search for the user you want to edit. The options in the Find user pane allow you to search for user names that contain or start with specific characters. By default, 10 user names are returned, but you can change this number. For example, you can restrict the search to find only 5 users or expand it to find 30 users.

The search returns an alphabetical list of user names that satisfy the search criteria. If the number of such user names exceeds the specified number of search results, this list is truncated as needed. To include more user names in the search results, you can rerun the search using a larger number of search results.

Note: You must enter at least one character in the search field before executing the search.

To edit an exiting user:

1. From the Main Page, click the **Edit existing user** link.
2. In the Search pane, set the search criteria.

   If desired, click next to **Search for names that** and select the **contain**, **match exactly**, or **start with** option.

   Enter one or more characters in the search field.

   If desired, enter a number in the **Number of search results** field.
3. Click **Search**.
4. In the Search Results pane, click **Edit** next to the name of the user you want to edit.

   You can also click the user name.
5. Update the user name, password, user status, and/or administrative permissions as needed.
6. Click **Save**.

Combine User Records

If you are using Forms authentication and have the appropriate permissions, you can also use the user editing function to combine user records. For example, if a user forgets his or her user name and creates a new one but has previously taken training under the old user name, you can edit one of the user names to merge the tracking data for the two user names into one user name.

Note: To successfully combine two user accounts, you must know the exact user name and password of the account into which the data are being merged.

To combine user records:

1. From the Main Page, click the **Edit existing user** link.
2. In the Search pane, set the search criteria to find the user name of the account you want to merge with another account.

   Note that this is the user name for the account that you want to remove.
3. Click **Search**.
4. In the Search Results pane, click **Edit** next to the user name of the account you want to merge with another account.

   You can also click the user name.
5. In the **User name** field, enter the user name of the account into which you want to merge the current account.
6. Enter the password for this account in both the **Password** and **Confirm password** fields.
7. Click **Save**.

   A message displays indicating that the user name already exists.
8. Click **Yes** to merge the users.
9. Delete the user name and usage history of the account whose data was merged (that is, the account that was edited).

Delete a User and Usage History

Usage tracking data remain in the database until the database is purged. Making a user inactive prevents the user from logging in but does not erase the user's tracking data. However, if you are using Forms authentication, you can delete the user and purge the tracking data.

If you are using Windows authentication, you cannot delete any users, but you can delete tracking data. In Windows authentication, access is defined by Windows users and user groups. Because Usage Tracking cannot delete a Windows account, it is possible only to remove the data stored in the Usage Tracking database, that is, the usage records.

To delete a user and purge tracking data:

1. From the Main Page, click the **Delete user and usage history** link.
2. In the Search pane, set the search criteria.

   If desired, click next to **Search for names that** and select the **contain**, **match exactly**, or **start with** option.

   Enter one or more characters in the search field.

   If desired, enter a number in the **Number of search results** field.
3. Click **Search**.
4. Click **Delete** next to the user you want to delete.

   You can also click the user name.
5. On the Delete User confirmation page, click **Delete**.

View the Error Log

All errors that occur while running Usage Tracking, including informational messages and database error messages, are written to an error log. You can access the error log by clicking the View error log link on the Main Page.

Each error message listing includes the severity of the message (information or error), the error number, the date and time, the source of the message, and a brief description. There are fields at the bottom of the listing that allow you to limit the list by date. You can choose to display log entries that occurred on or after a given date and on or before another date. To change the date range displayed, you can type new dates and click the Reselect button to redisplay the results for the new dates.

You can also purge the error log, removing all entries that are older than a certain date. To do so, enter a date in the field next to the Purge button. When you click the Purge button, all log entries on or before that date are deleted.

After viewing the error log, you can return to the Main Page by using your browser's Back button.

View the User Summary

Using the View user summary link on the Main Page, you can view a listing of the numbers of registered users and active users. You can use this summary to determine how many users are actively accessing the Player. This summary is available for both Windows and Forms authentication. However, data cannot be calculated for this report if you are using anonymous authentication for Usage Tracking.

After viewing the user summary, you can return to the Main Page by using the link at the top of the page.

7. Index

