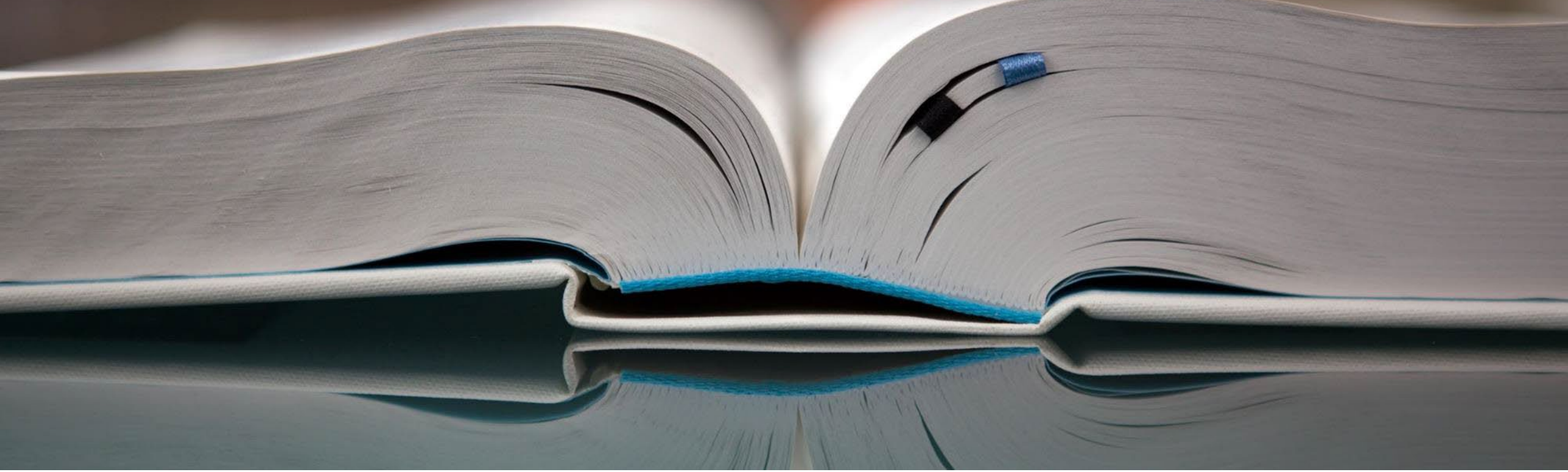

Thomson Reuters Compliance Learning
Compliance Learning Manager

Administrator Guide

THOMSON REUTERS®

MENU

Home Page
- Log in as User
- Log in as Administrator
- Log in as Administrator – Resources
- Support page

The Dashboard
- Admin View
- The Dashboard

Managing Users
- Admin View
- Searching for Users
- Viewing a User's Activity
- Editing a User's Profile
- Adding a Single User
- Deactivating Users
- Mass Enrollment

Course Management
- Admin View
- Searching for a Course
- Filtering Courses by Categories
- Filtering Client Courses
- Filtering Courses by language
- User Enrollment
- Editing User Enrollment
- Enrolling Users Via CSV
- Course Reports

Managing Reports
- Admin View

Managing New Reports
- Admin View
- Course Summary
- Course Dashboard
- Branches Dashboard
- Creating a Custom Report
- Users - Courses report
- Users - Courses report: Decoding Downloaded Report
- Users – Learning Objects report
- Users – Learning Objects report: Decoding Downloaded Report

Managing My Teams
- My Team Overview
- My Team - Set up using CLMS interface
- My Team - Set up using bulk upload tool
- My Team - Download manager details

Managing Notifications
- Admin View
- Managing the Email Schedule
- Managing Email Recipients
- Managing Associated Courses
- Activating and Deactivating Emails
- Editing Existing Emails

Unassigning and Reassigning Users
- Admin View
- Un-assigning A User
- Re-assigning the User

Managing a Newsletter
- Admin View
- Newsletter

Managing Certificates
- Admin View
- Downloading Certificates

Managing External Training Records
- Admin View
- Adding a Single Record
- Editing or Deleting Records
- Adding Records in Bulk
- Downloading External Training Records

Background Jobs
- Admin View
- Background Jobs

Mobile App
- Mobile App Features
- Impact of Enabling SSO on Mobile App

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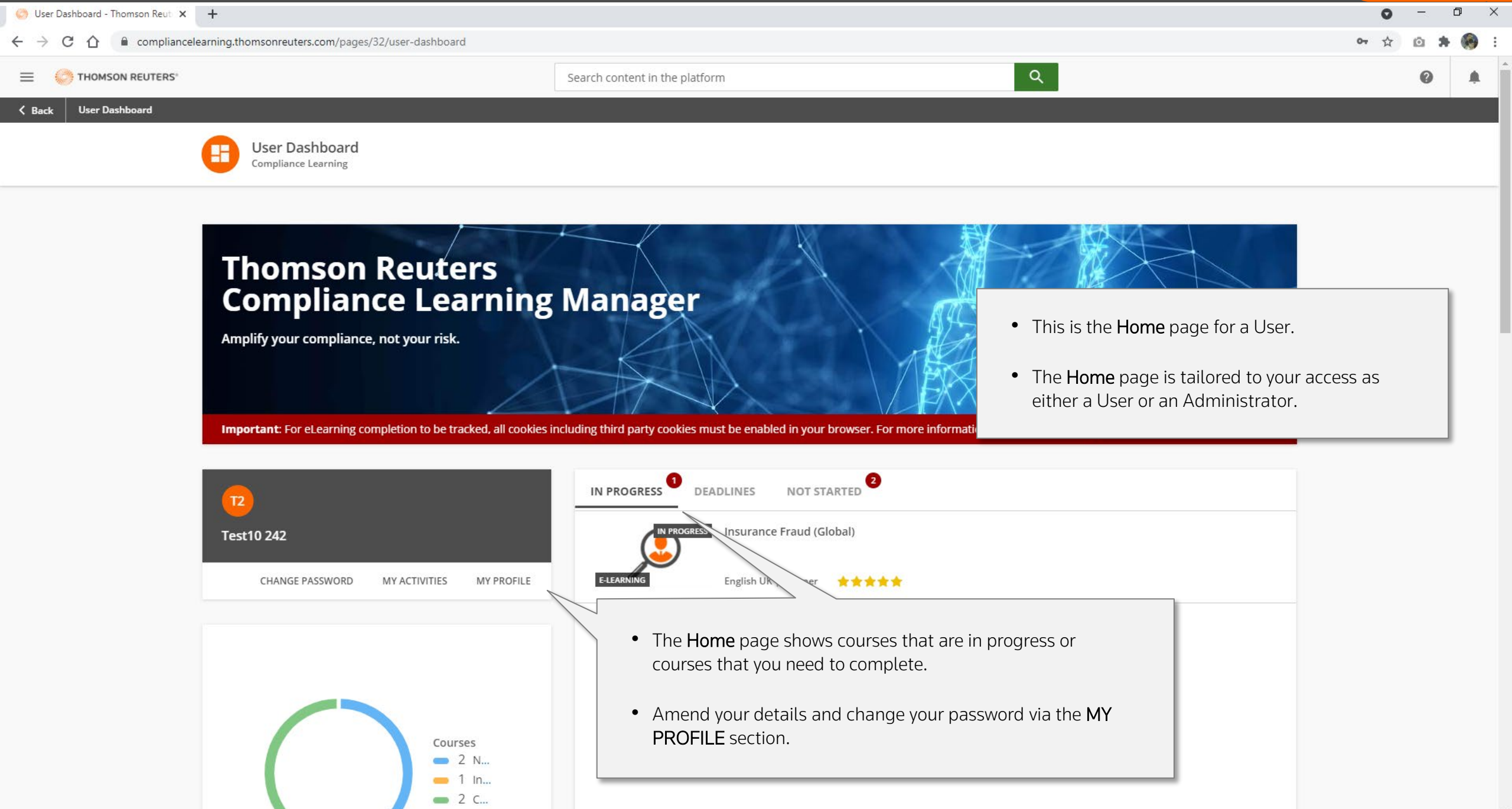
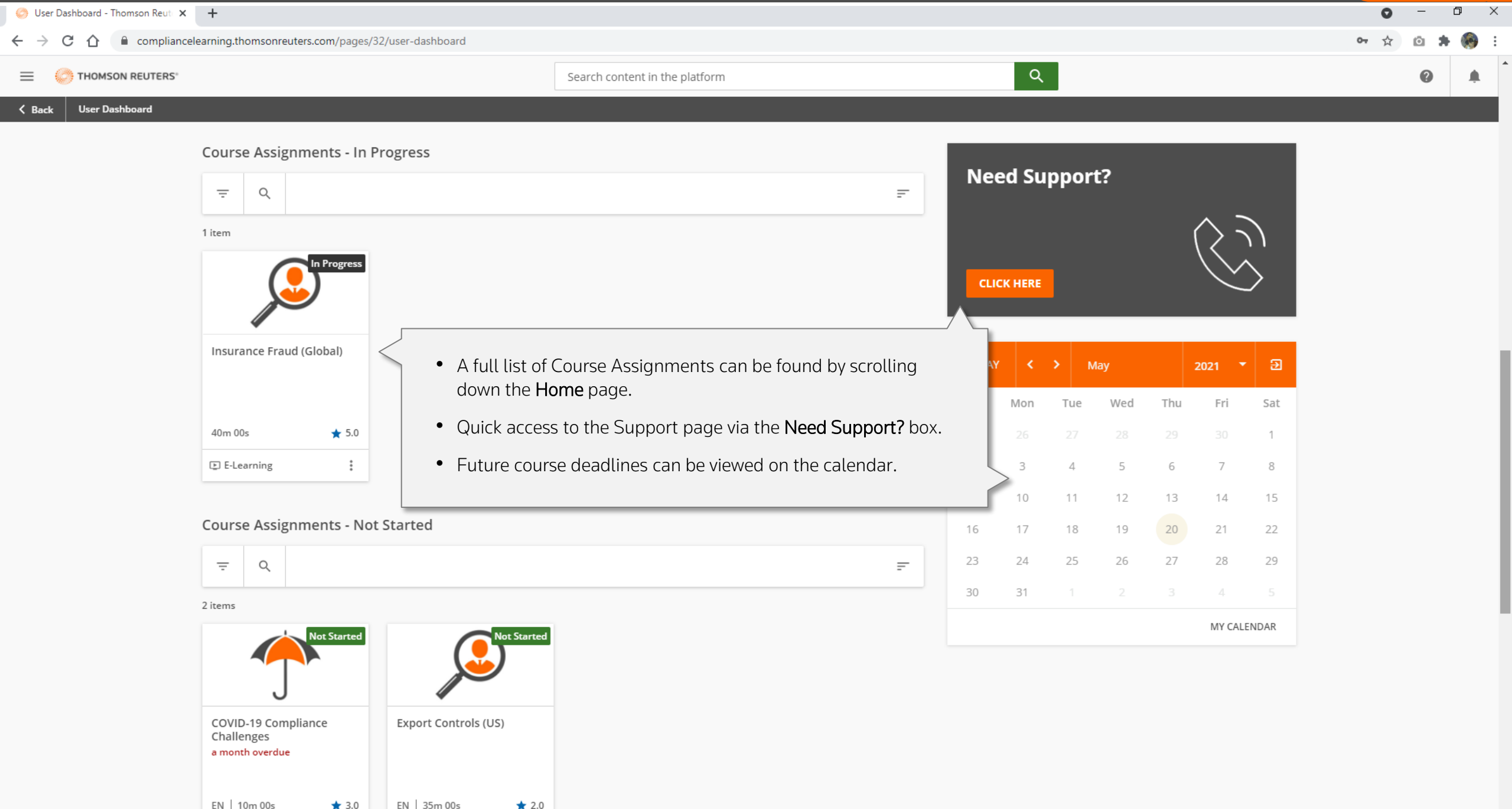
Return to Menu

Home Page

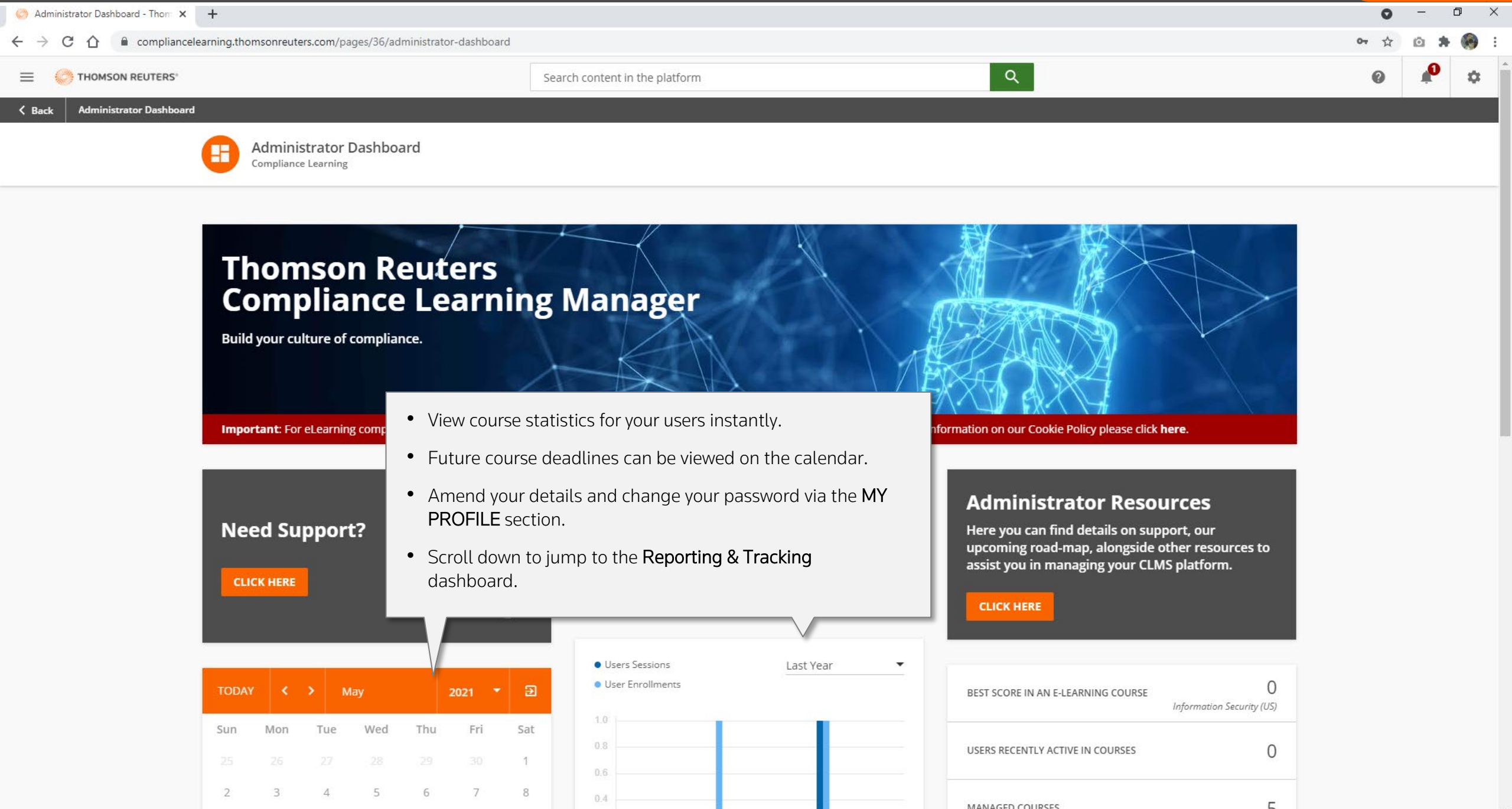


- This is the **Home** page for a User.
- The **Home** page is tailored to your access as either a User or an Administrator.

- The **Home** page shows courses that are in progress or courses that you need to complete.
- Amend your details and change your password via the **MY PROFILE** section.



- A full list of Course Assignments can be found by scrolling down the **Home** page.
- Quick access to the Support page via the **Need Support?** box.
- Future course deadlines can be viewed on the calendar.


Administrator Dashboard - Thon
compliancelearning.thomsonreuters.com/pages/36/administrator-dashboard
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Administrator Dashboard
Compliance Learning
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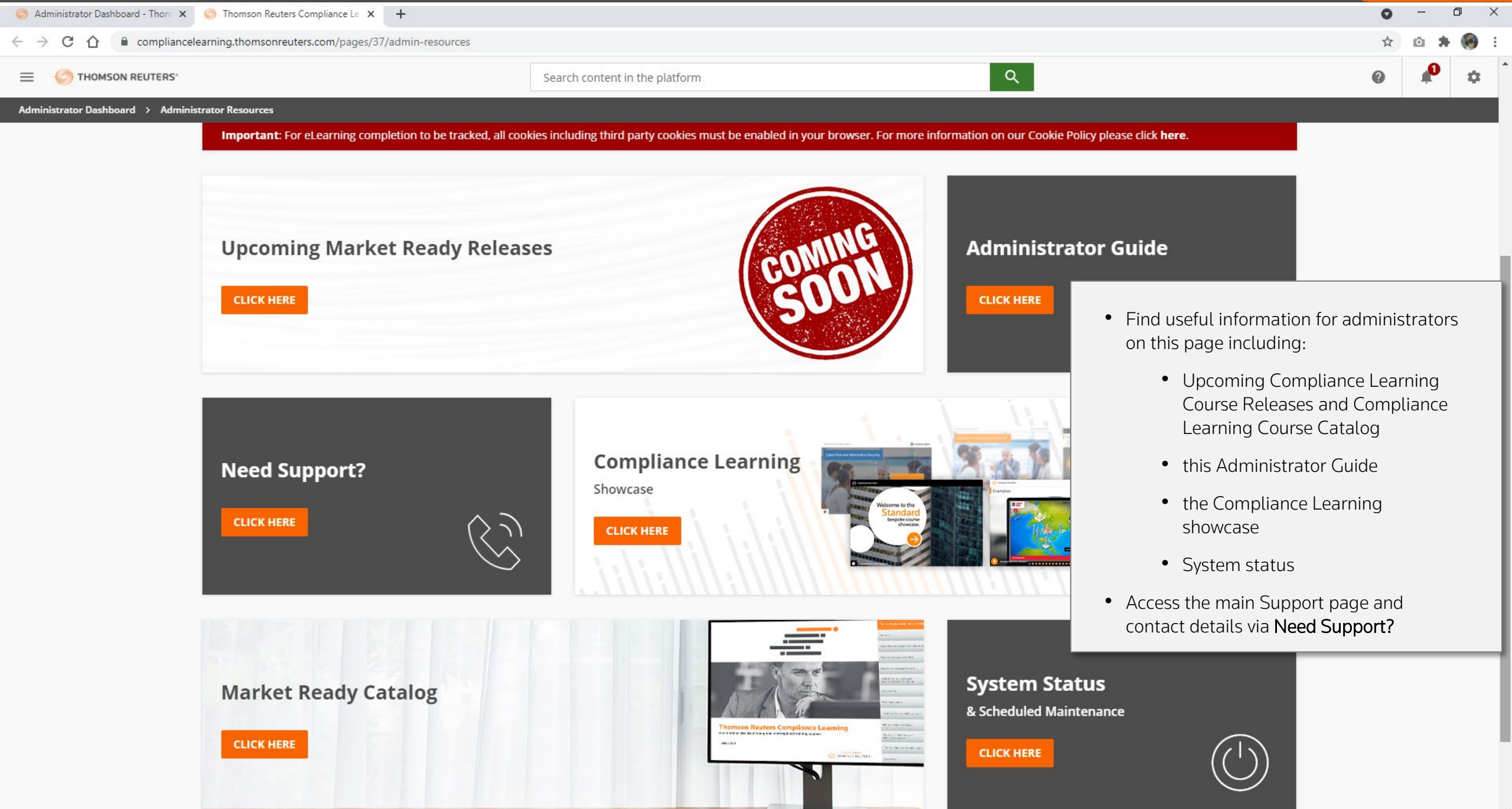
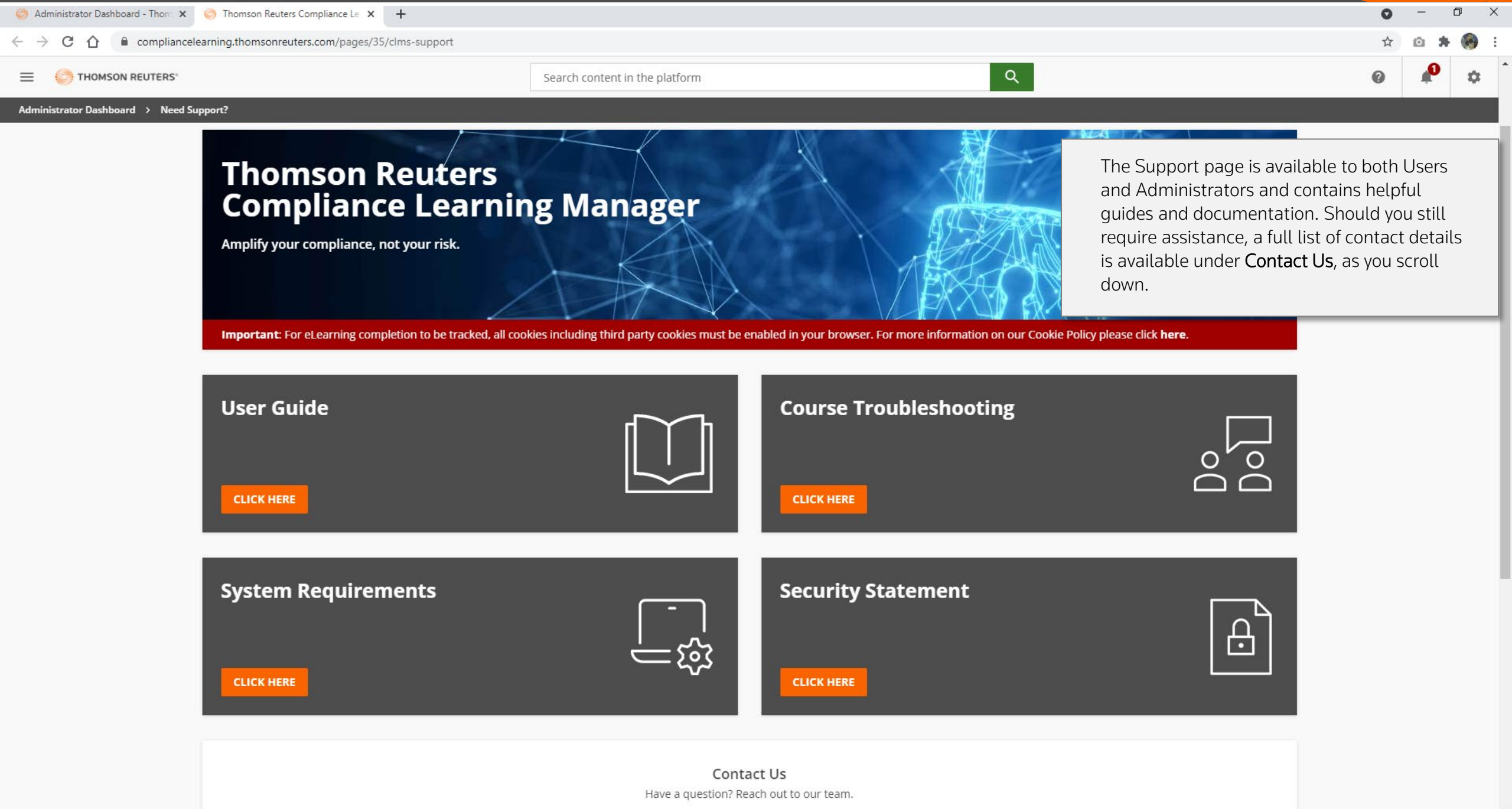
Compliance Learning Manager
Build your culture of compliance.
Important: For eLearning comp
nformation on our Cookie Policy please click here.
Need Support?
CLICK HERE
View course statistics for your users instantly.
Future course deadlines can be viewed on the calendar.
Amend your details and change your password via the MY PROFILE section.
Scroll down to jump to the Reporting & Tracking dashboard.
Administrator Resources
Here you can find details on support, our upcoming road-map, alongside other resources to assist you in managing your CLMS platform.
CLICK HERE
TODAY
May
2021
Sun Mon Tue Wed Thu Fri Sat
Users Sessions
User Enrollments
Last Year
1.0
0.8
0.6
0.4
BEST SCORE IN AN E-LEARNING COURSE
0
Information Security (US)
USERS RECENTLY ACTIVE IN COURSES
0



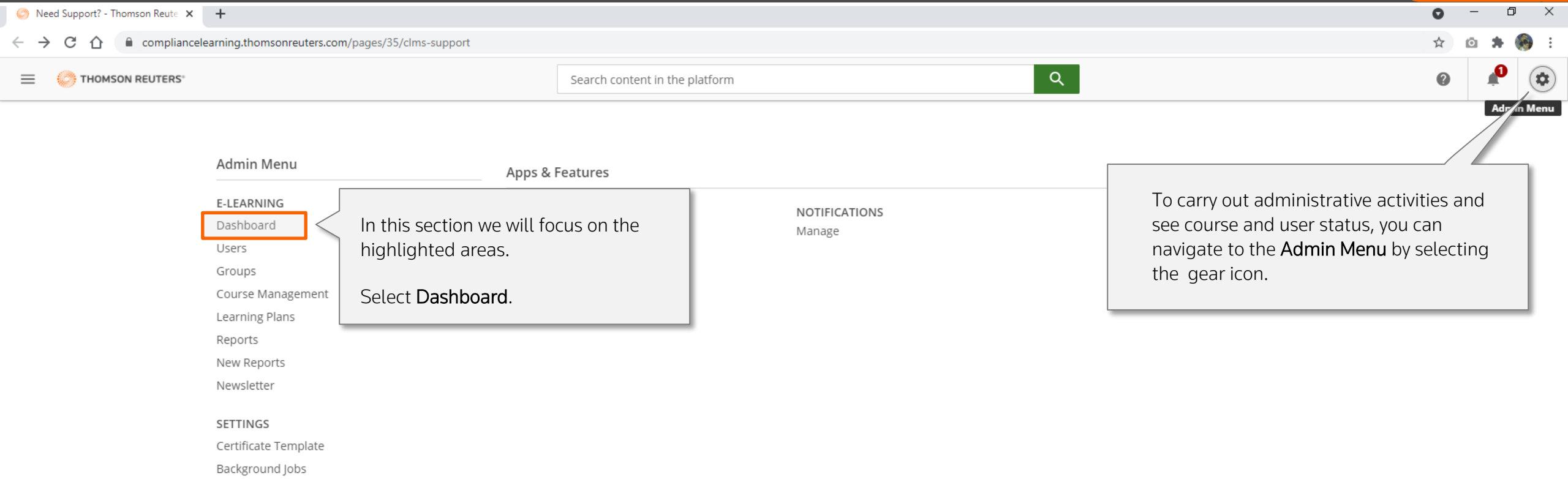
- Find useful information for administrators on this page including:
  - Upcoming Compliance Learning Course Releases and Compliance Learning Course Catalog
  - this Administrator Guide
  - the Compliance Learning showcase
  - System status
- Access the main Support page and contact details via Need Support?



The Support page is available to both Users and Administrators and contains helpful guides and documentation. Should you still require assistance, a full list of contact details is available under **Contact Us**, as you scroll down.

Return to Menu

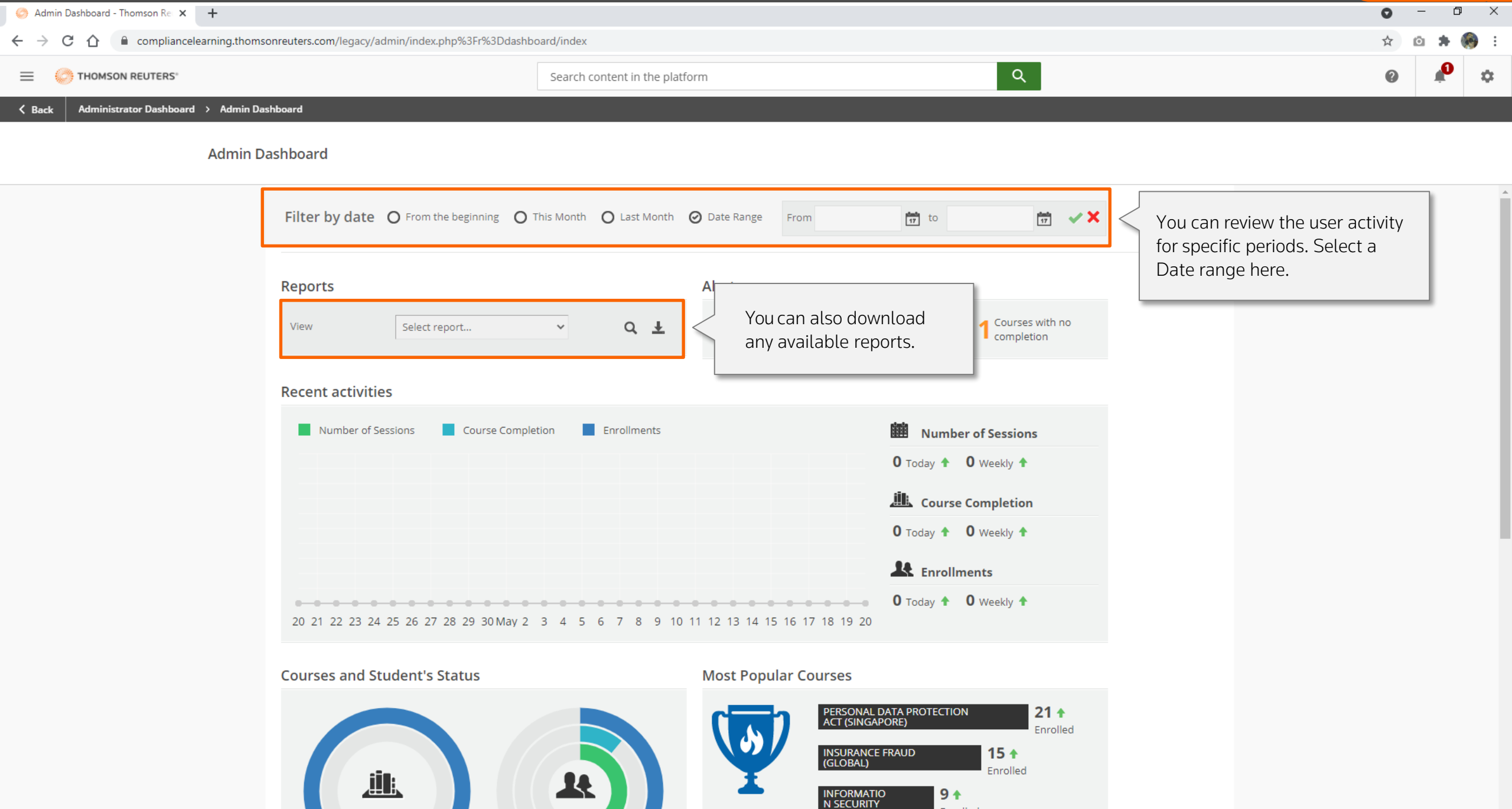
The Dashboard



In this section we will focus on the highlighted areas.

Select **Dashboard**.

To carry out administrative activities and see course and user status, you can navigate to the **Admin Menu** by selecting the gear icon.


Admin Dashboard - Thomson Re
compliancelearning.thomsonreuters.com/legacy/admin/index.php%3Fr%3Ddashboard/index
THOMSON REUTERS
Search content in the platform
Back
Administrator Dashboard
Admin Dashboard
Admin Dashboard
Filter by date
From the beginning
This Month
Last Month
Date Range
From
to
You can review the user activity for specific periods. Select a Date range here.
Reports
View
Select report...
You can also download any available reports.
1 Courses with no completion
Recent activities
Number of Sessions
Course Completion
Enrollments
20 21 22 23 24 25 26 27 28 29 30 May 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20
Number of Sessions
0 Today
0 Weekly
Course Completion
0 Today
0 Weekly
Enrollments
0 Today
0 Weekly
Courses and Student's Status
Most Popular Courses
PERSONAL DATA PROTECTION ACT (SINGAPORE)
21
Enrolled
INSURANCE FRAUD (GLOBAL)
15
Enrolled
INFORMATIO N SECURITY
9

The Dashboard (2)

Return to Menu

Admin Dashboard - Thomson Re

compliancelearning.thomsonreuters.com/legacy/admin/index.php%3Fr%3Ddashboard/index

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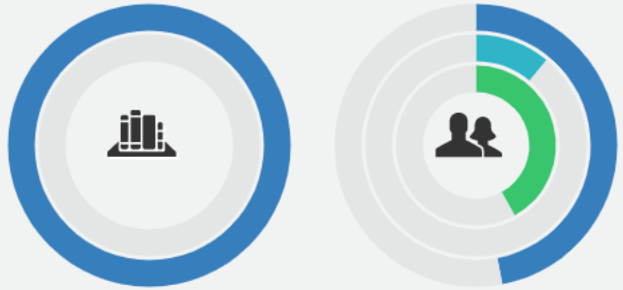
Search content in the platform

Back | Administrator Dashboard > Admin Dashboard

Admin Dashboard

Courses and Student's Status



100% ACTIVE

0% UNDER MAINTENANCE

47% NOT YET STARTED

11% IN PROGRESS

42% COMPLETED

Most Popular Courses

PERSONAL DATA PROTECTION ACT (SINGAPORE)	21 Enrolled
INSURANCE FRAUD (GLOBAL)	15 Enrolled
INFORMATIO N SECURITY (US)	9 Enrolled

Least Completed Courses

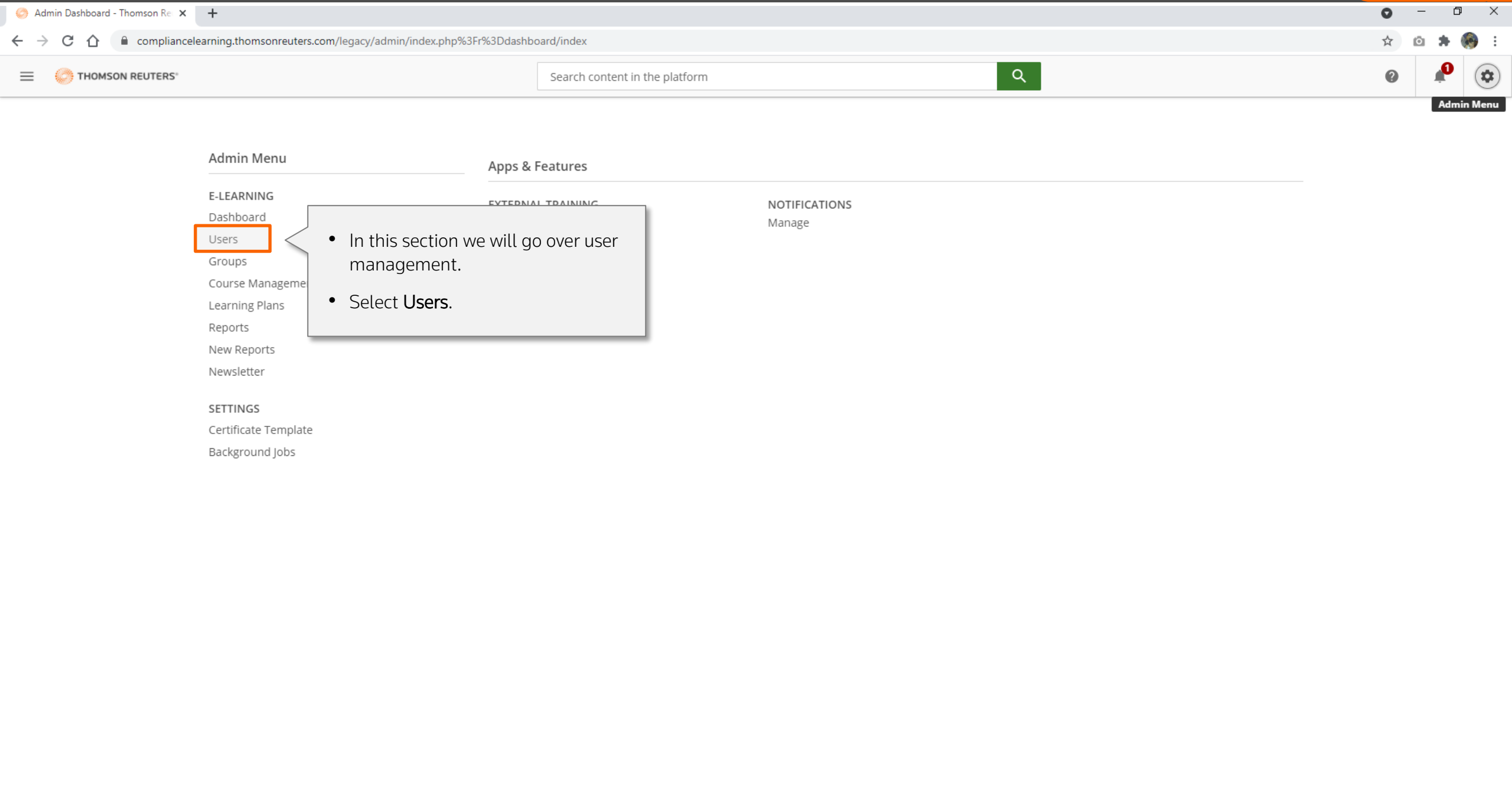
Anti-Money Laundering (AML) (Global)	0.00%
Insurance Fraud (Global)	6.67%
Information Security (US)	33.33%

Most Completed Courses

Personal Data Protection Act (Singapore)	71.43%
Information Security and Cyber Risk Awareness (G...	37.50%
Information Security (US)	33.33%

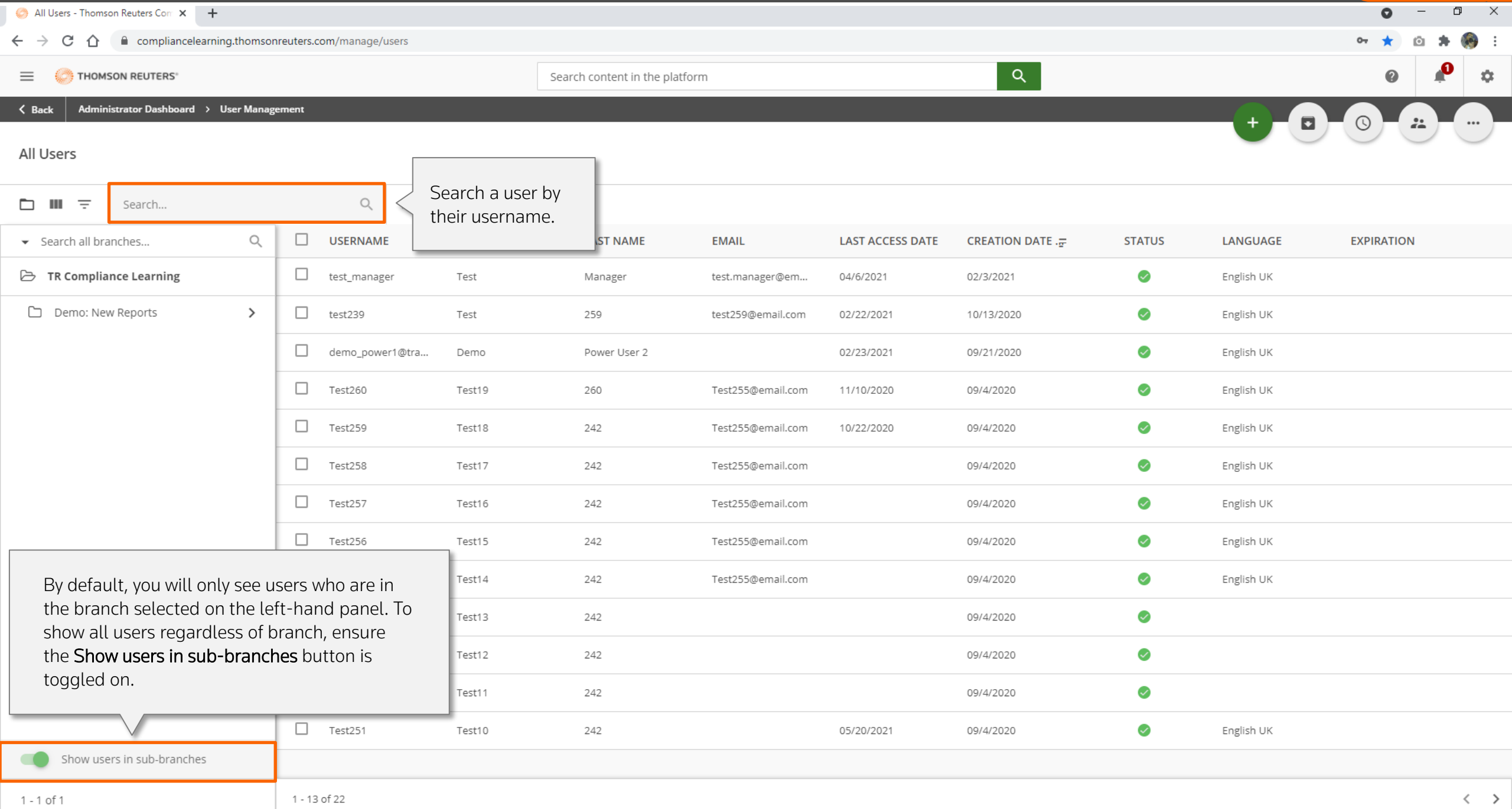
A further view of the information available on the Dashboard is listed here.

Managing Users


Admin Dashboard - Thomson Re
compliancelearning.thomsonreuters.com/legacy/admin/index.php%3Fr%3Ddashboard/index
THOMSON REUTERS
Search content in the platform
Admin Menu
Admin Menu
E-LEARNING
Dashboard
Users
Groups
Course Manageme
Learning Plans
Reports
New Reports
Newsletter
SETTINGS
Certificate Template
Background Jobs
Apps & Features
NOTIFICATIONS
Manage
In this section we will go over user management.
Select Users.

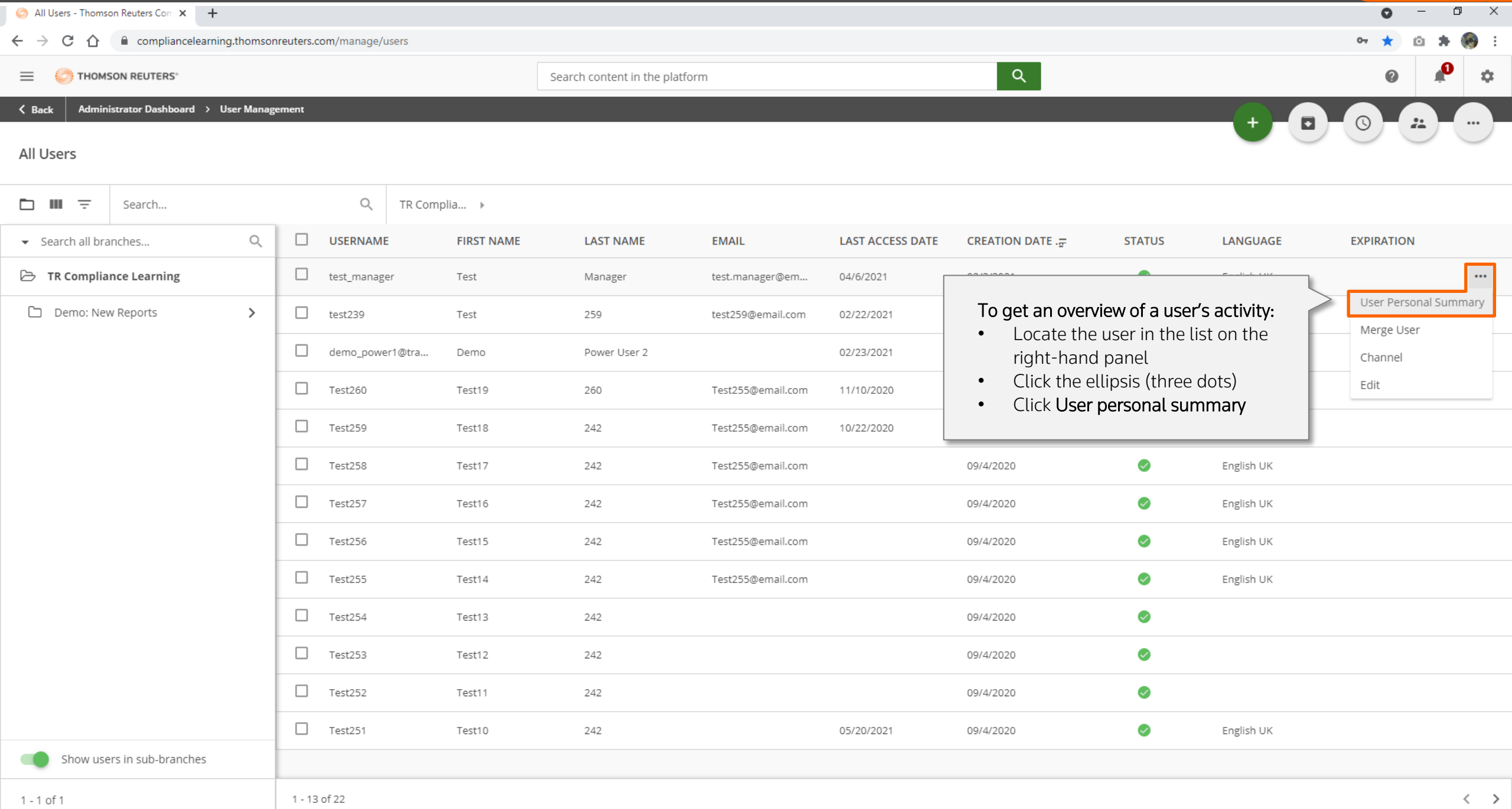
Searching for User

Return to Menu



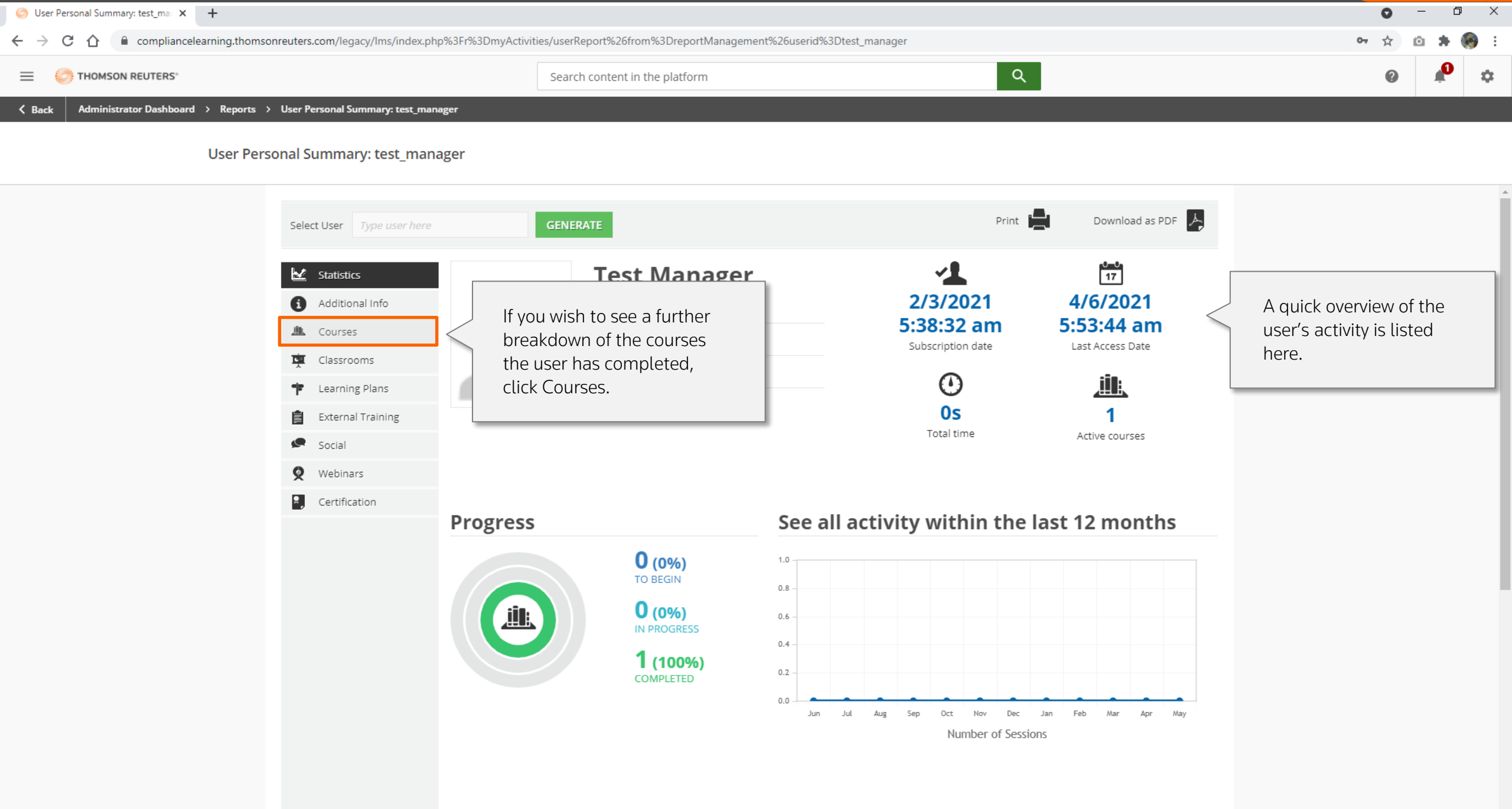
Viewing a User's Activity(1)

Return to Menu



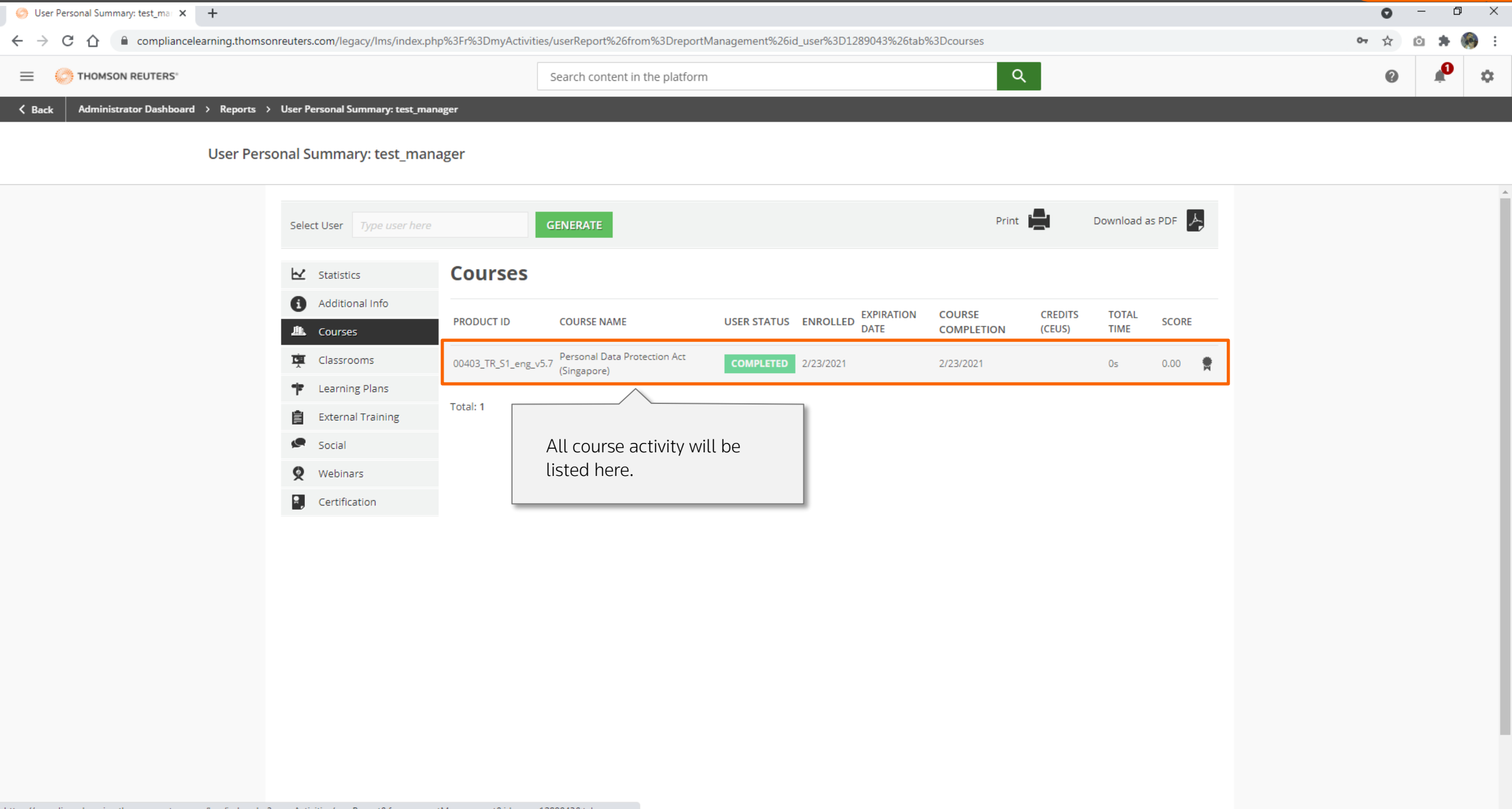
Viewing a User's Activity(2)

Return to Menu



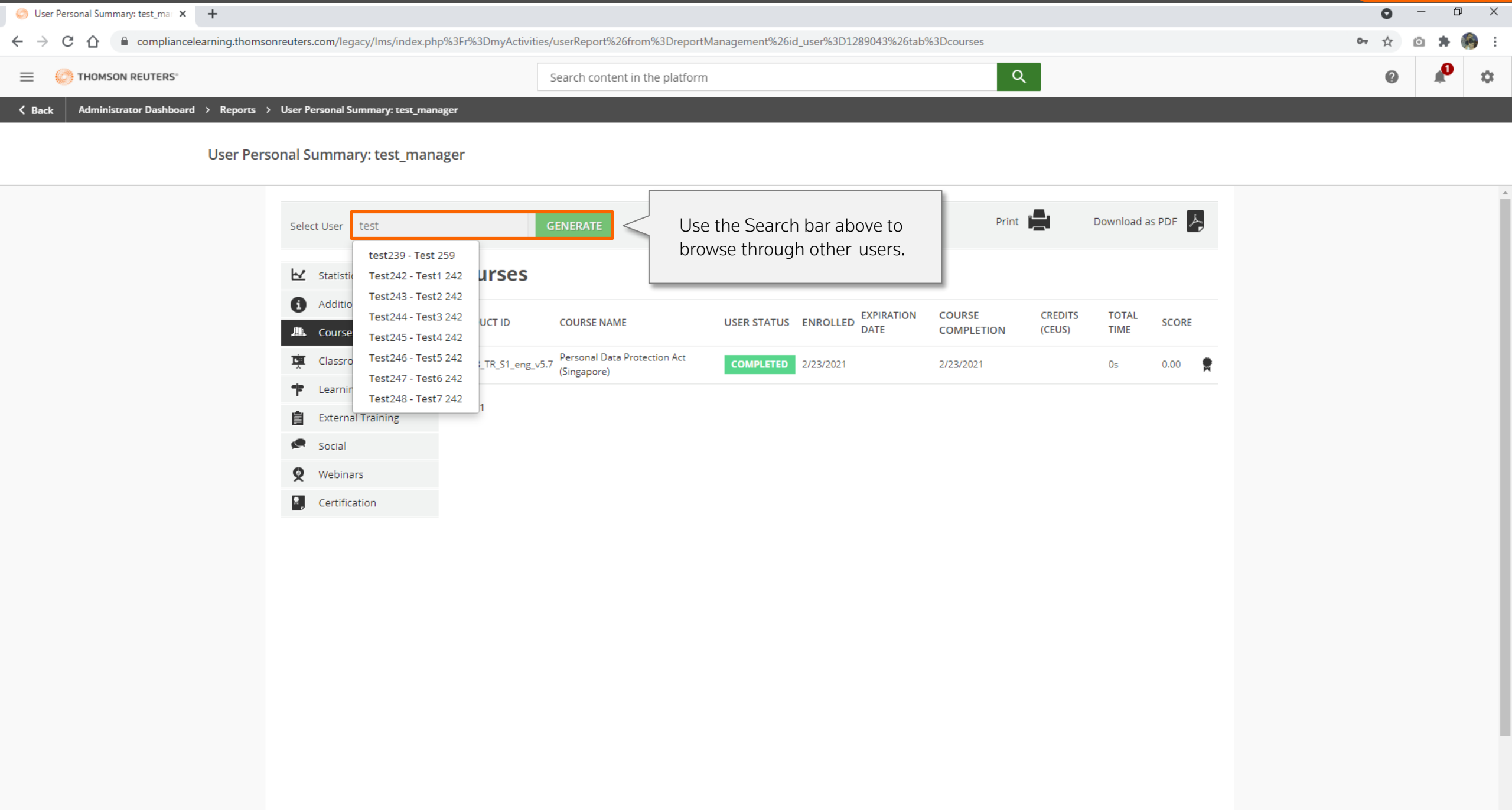
Viewing a User's Activity(3)

Return to Menu



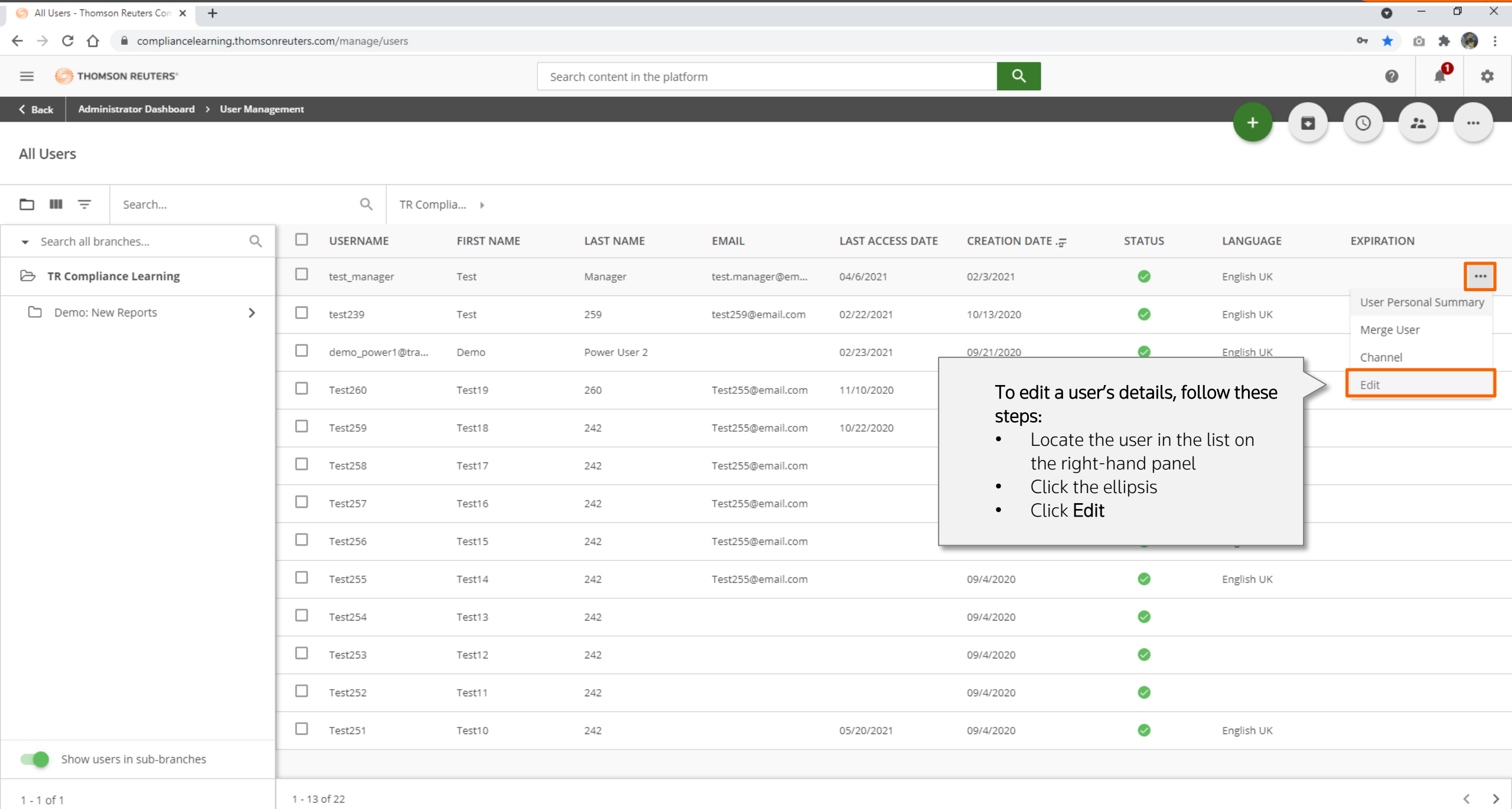
Viewing a User's Activity(4)

Return to Menu



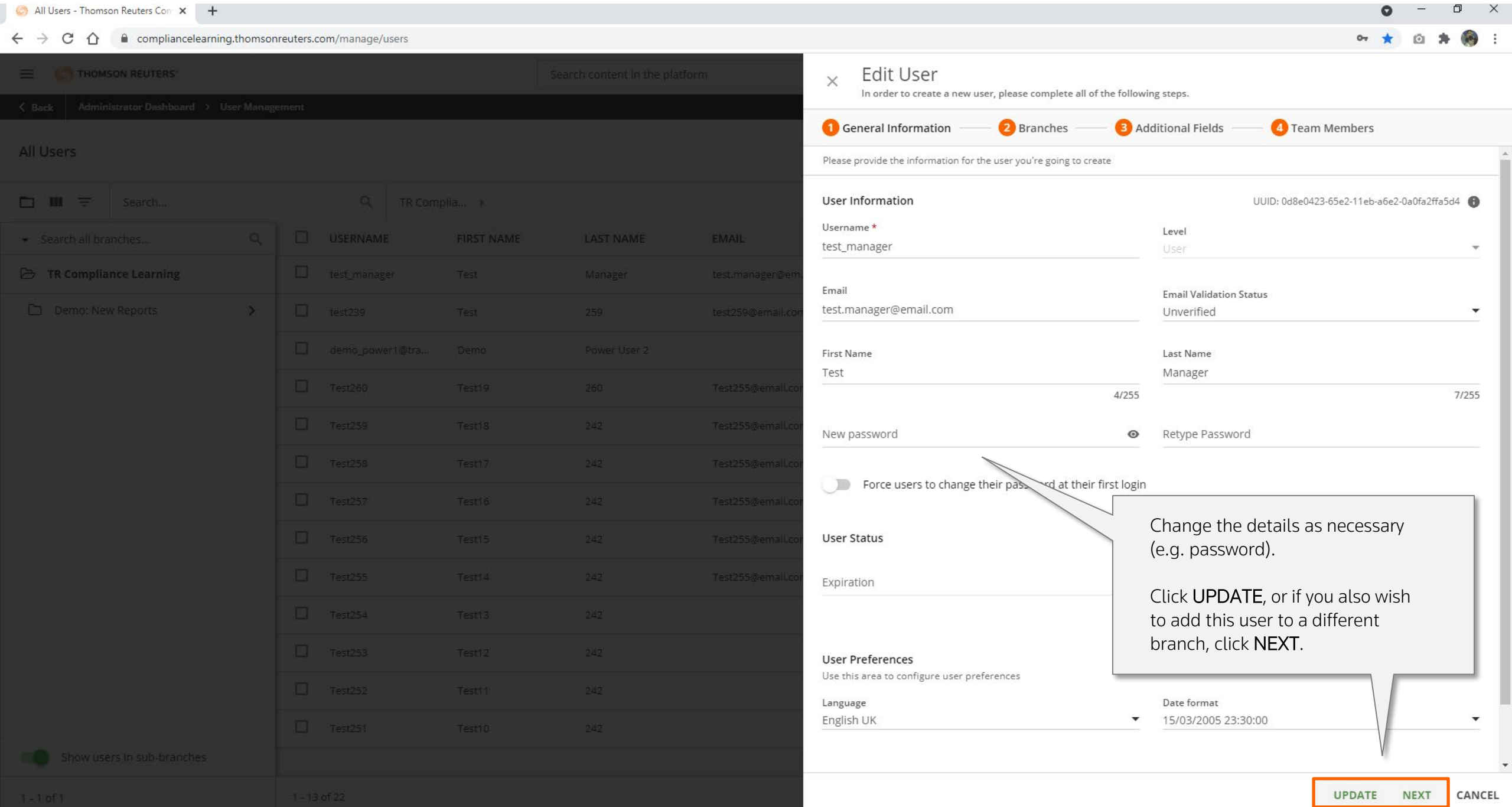
Editing a User's Profile (1)

Return to Menu



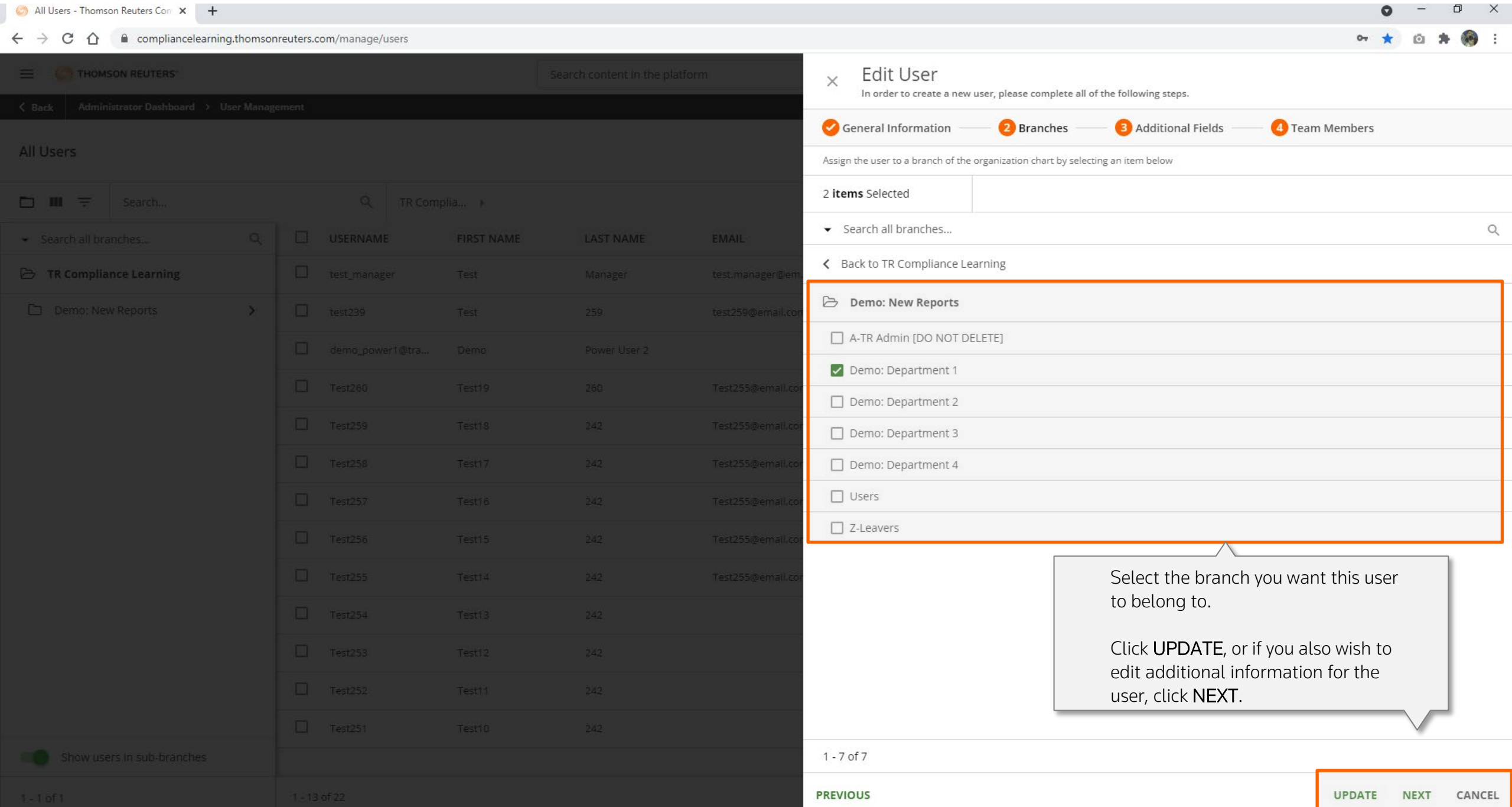
Editing a User's Profile (2)

Return to Menu



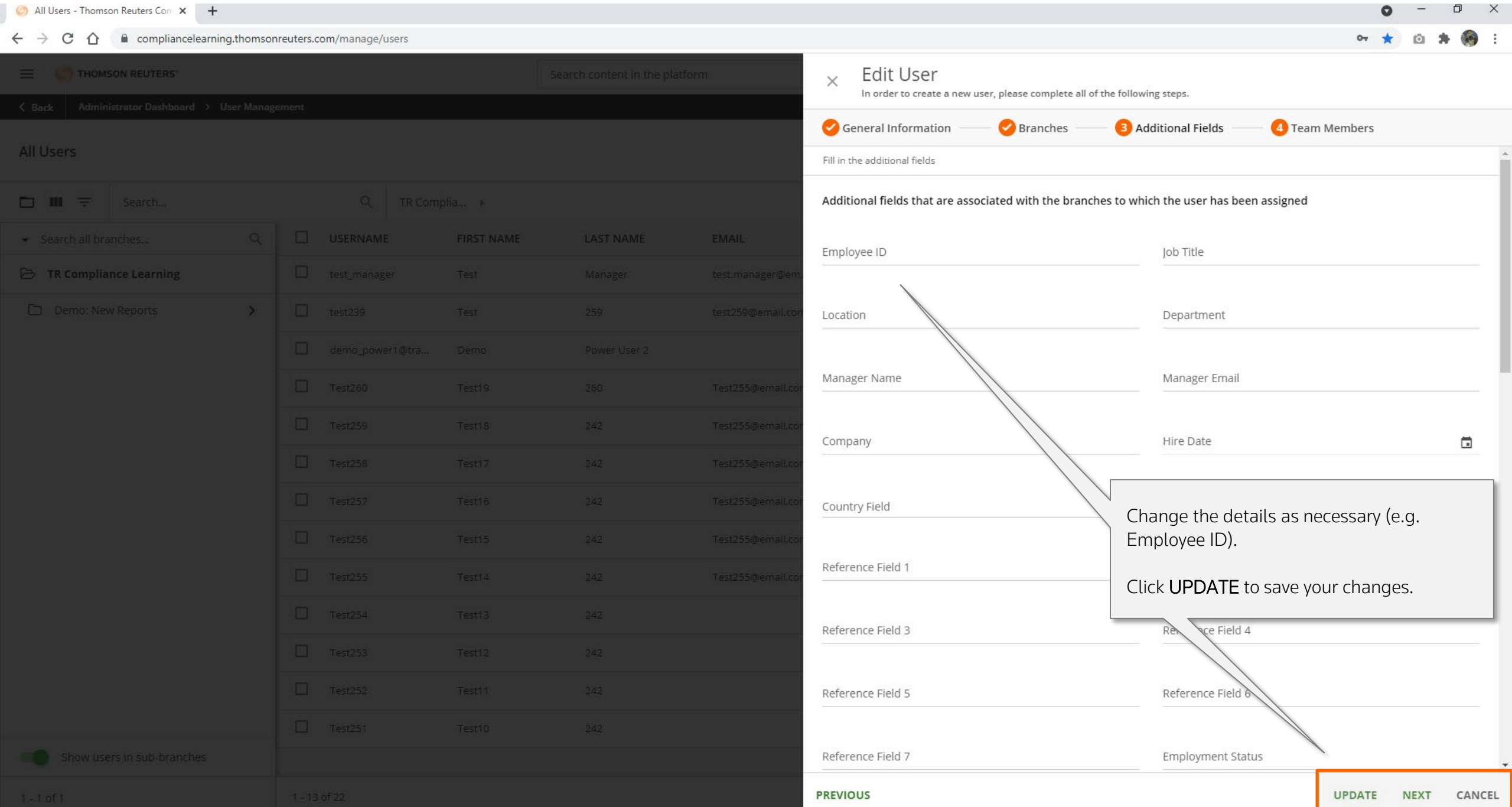
Editing a User's Profile (3)

Return to Menu



Editing a User's Profile (4)

Return to Menu

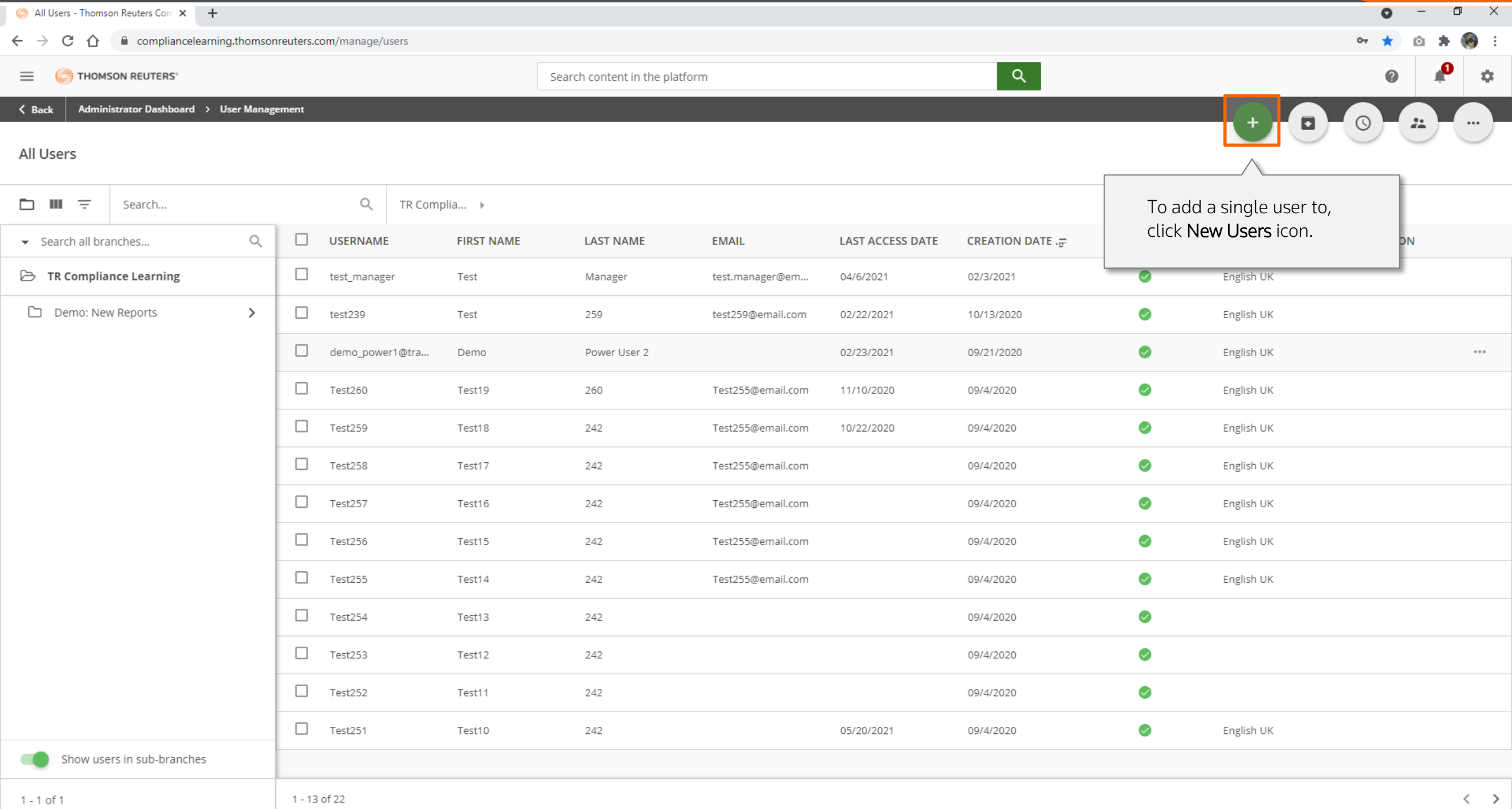


Change the details as necessary (e.g. Employee ID).

Click **UPDATE** to save your changes.

Adding a Single User (1)

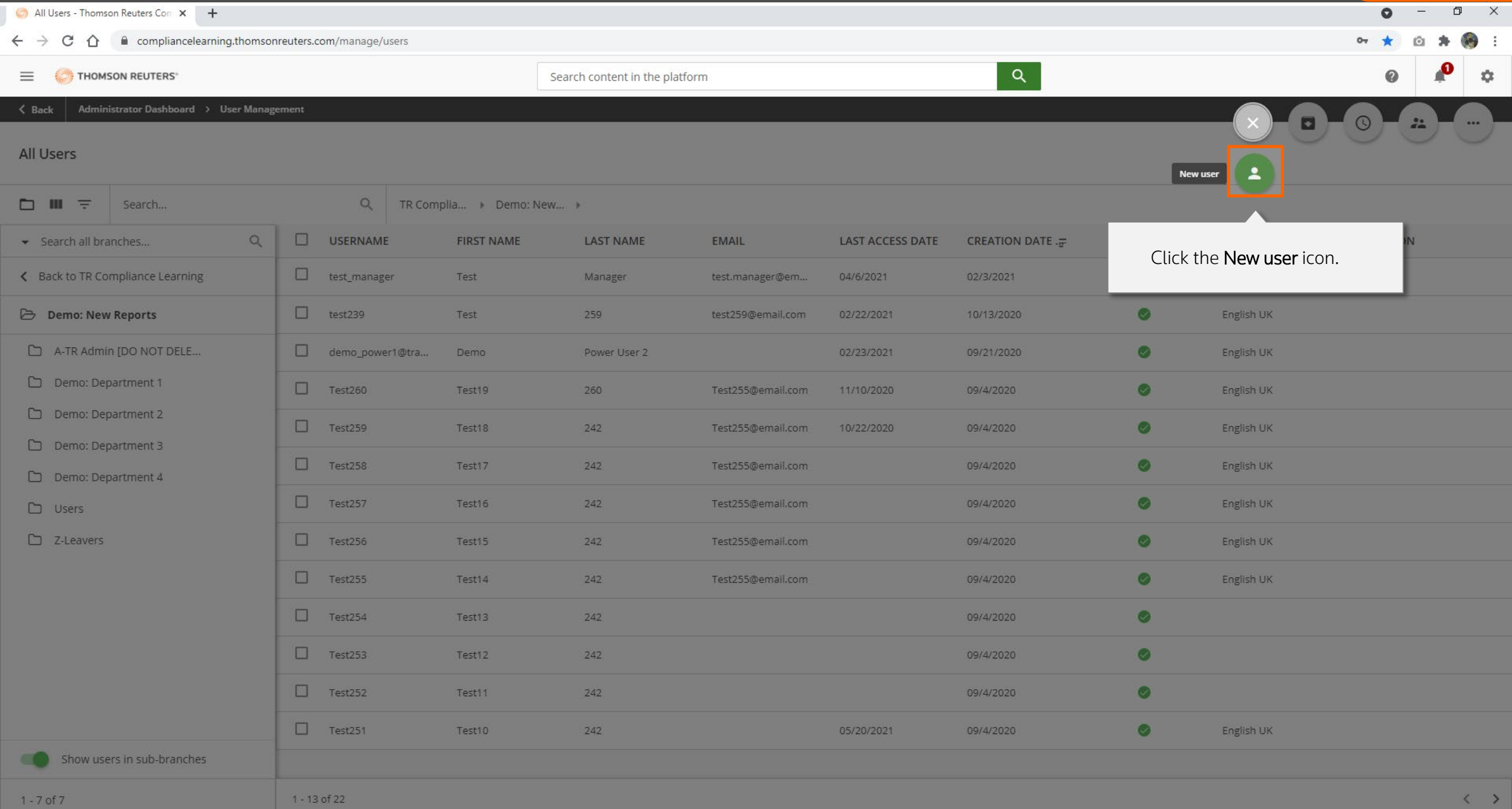
Return to Menu



USERNAME	FIRST NAME	LAST NAME	EMAIL	LAST ACCESS DATE	CREATION DATE		
test_manager	Test	Manager	test.manager@em...	04/6/2021	02/3/2021		English UK
test239	Test	259	test259@email.com	02/22/2021	10/13/2020		English UK
demo_power1@tra...	Demo	Power User 2		02/23/2021	09/21/2020		English UK
Test260	Test19	260	Test255@email.com	11/10/2020	09/4/2020		English UK
Test259	Test18	242	Test255@email.com	10/22/2020	09/4/2020		English UK
Test258	Test17	242	Test255@email.com		09/4/2020		English UK
Test257	Test16	242	Test255@email.com		09/4/2020		English UK
Test256	Test15	242	Test255@email.com		09/4/2020		English UK
Test255	Test14	242	Test255@email.com		09/4/2020		English UK
Test254	Test13	242			09/4/2020		
Test253	Test12	242			09/4/2020		
Test252	Test11	242			09/4/2020		
Test251	Test10	242		05/20/2021	09/4/2020		English UK

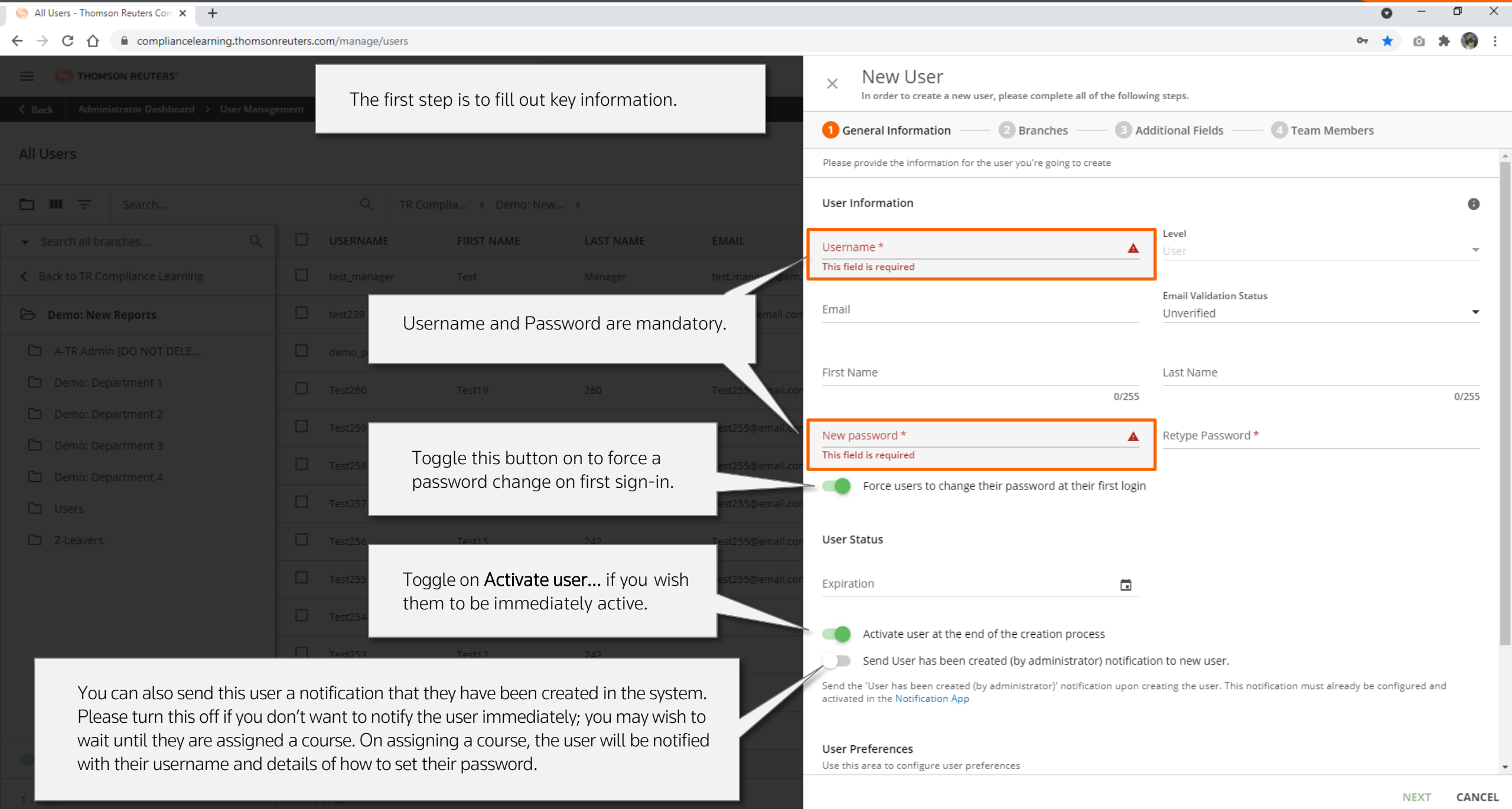
Adding a Single User (2)

Return to Menu



Adding a Single User (3)

Return to Menu



The first step is to fill out key information.

Username and Password are mandatory.

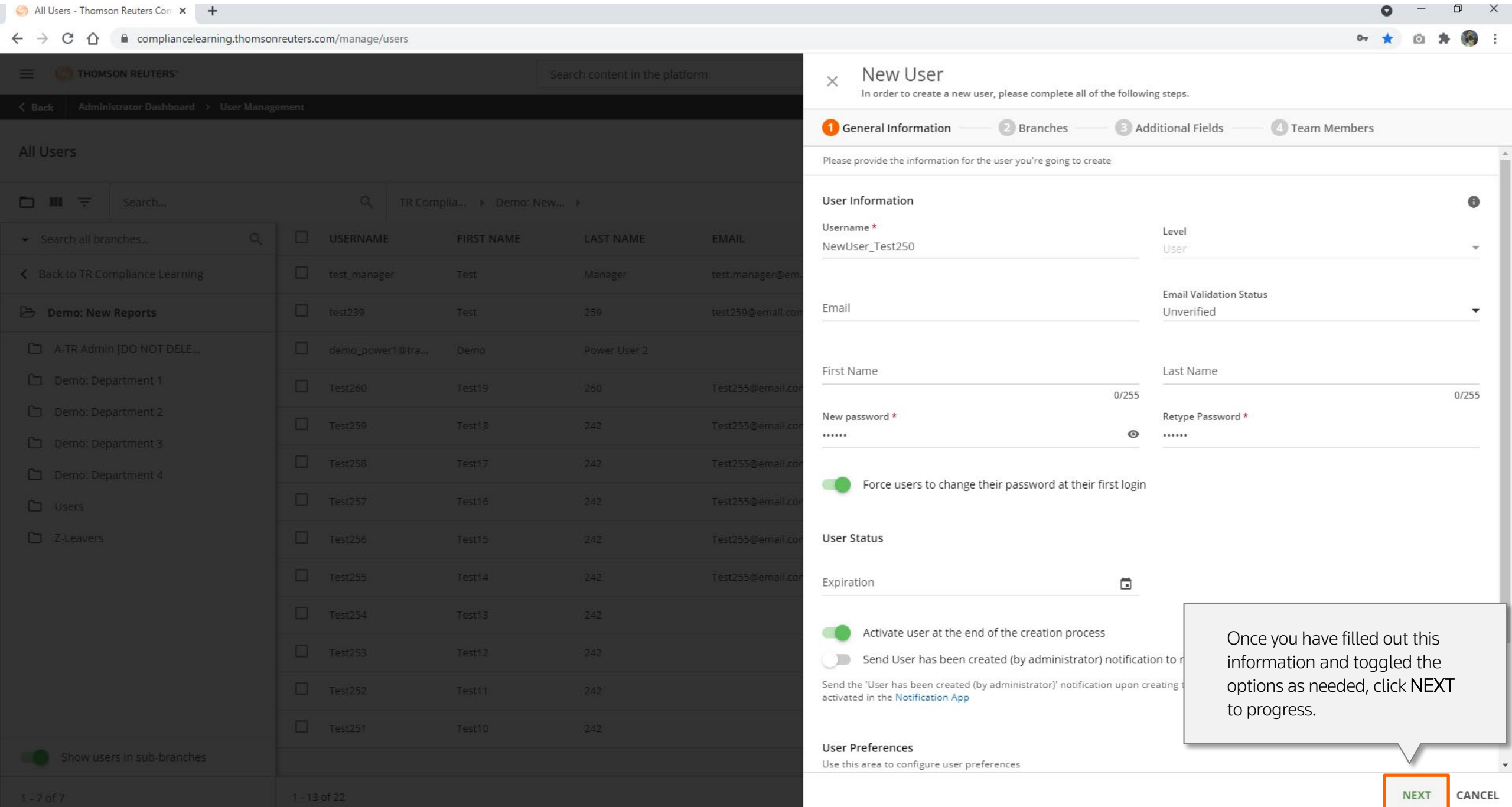
Toggle this button on to force a password change on first sign-in.

Toggle on **Activate user...** if you wish them to be immediately active.

You can also send this user a notification that they have been created in the system. Please turn this off if you don't want to notify the user immediately; you may wish to wait until they are assigned a course. On assigning a course, the user will be notified with their username and details of how to set their password.

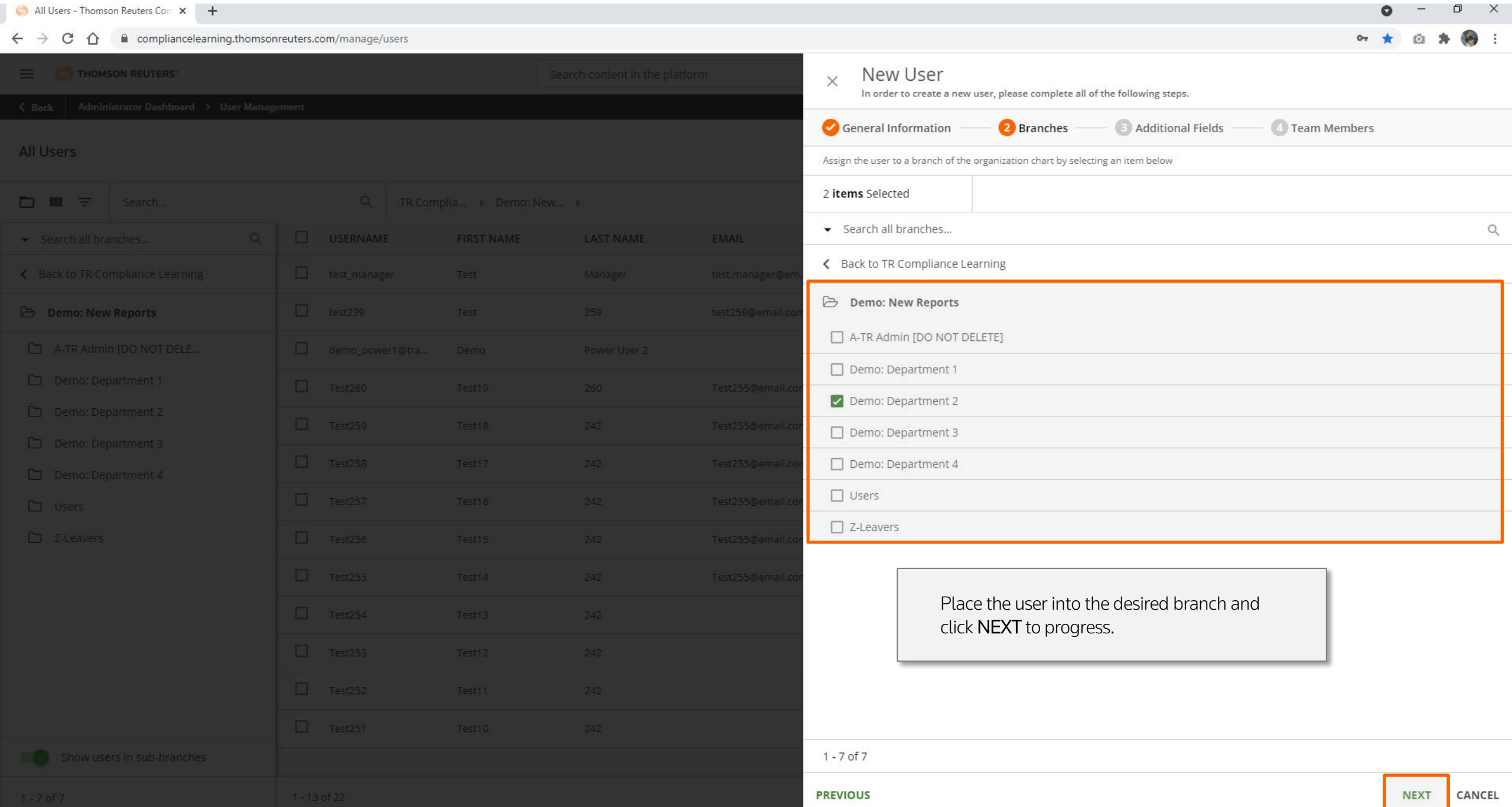
Adding a Single User (4)

Return to Menu



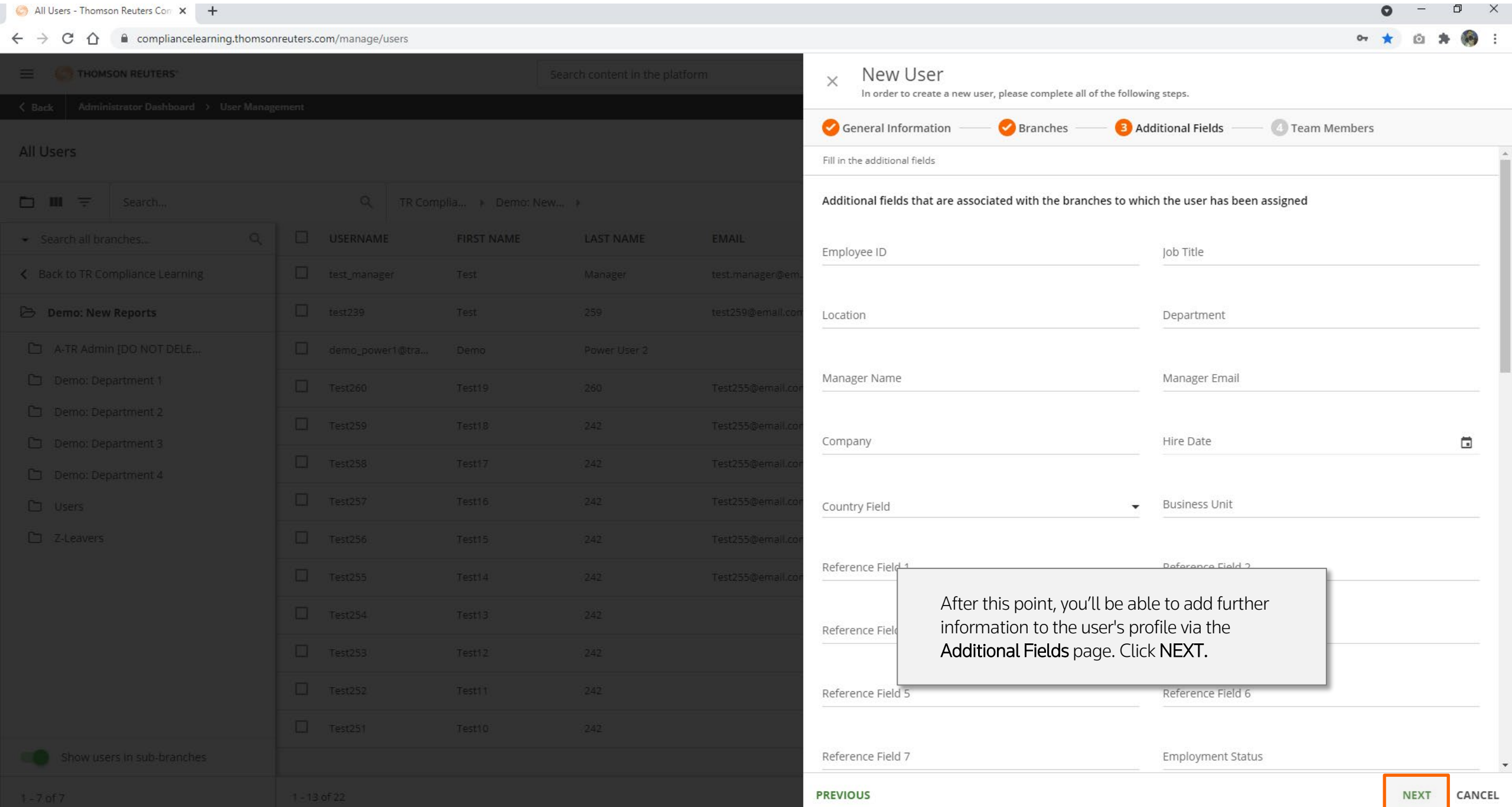
Adding a Single User (5)

Return to Menu



Adding a Single User (6)

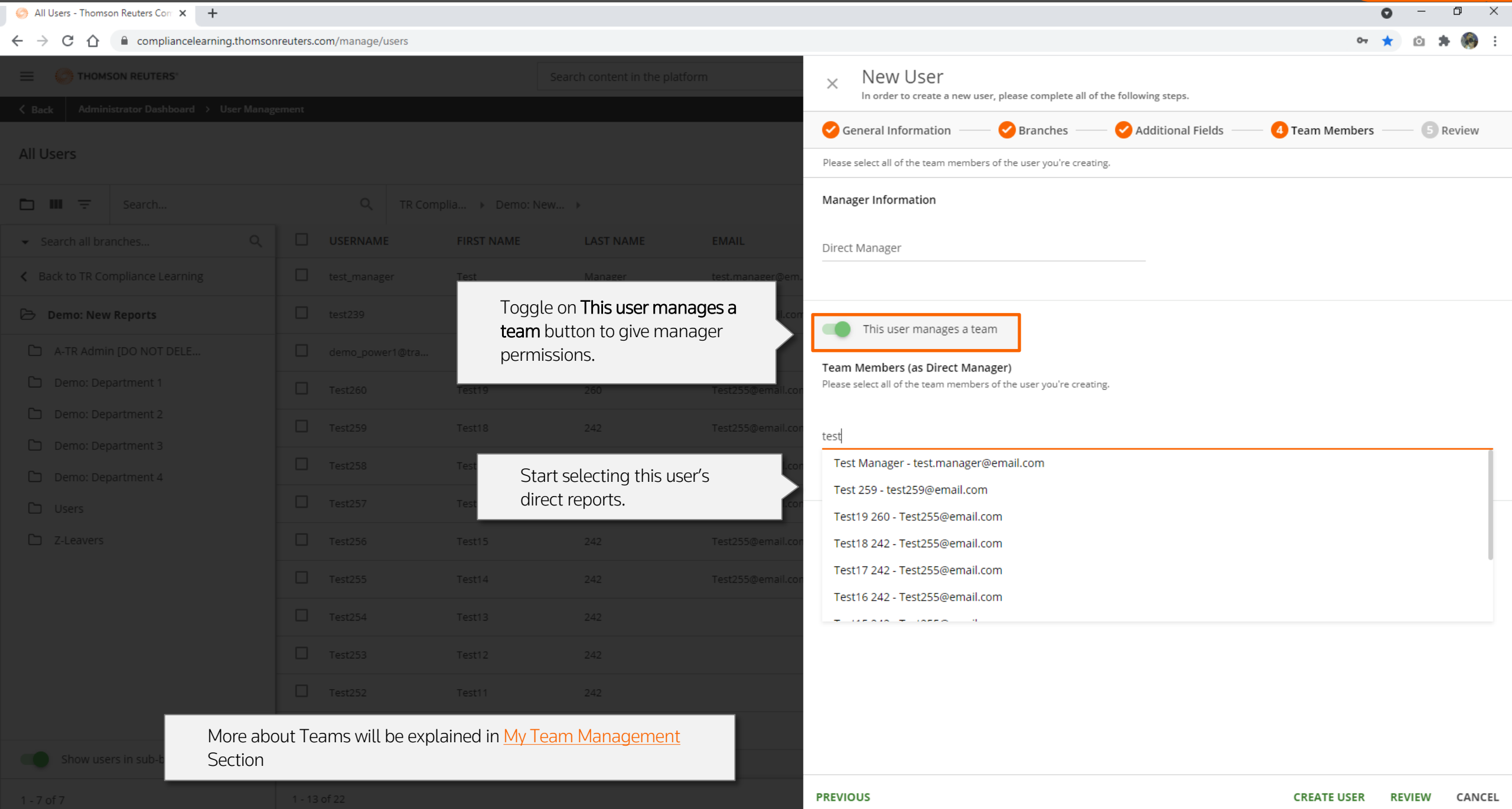
Return to Menu



After this point, you'll be able to add further information to the user's profile via the **Additional Fields** page. Click **NEXT.**

Adding a Single User (6)

Return to Menu



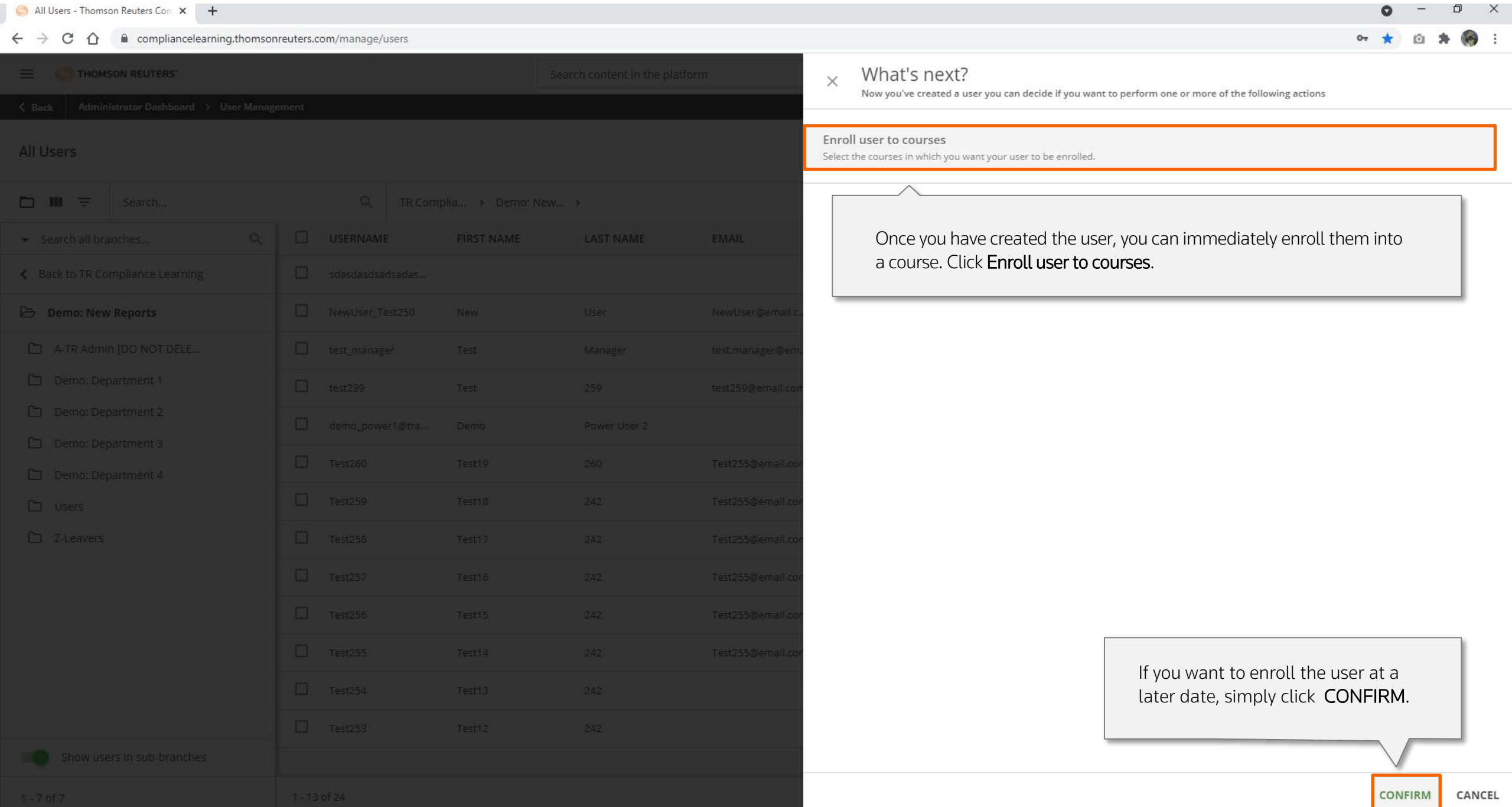
Toggle on **This user manages a team** button to give manager permissions.

Start selecting this user's direct reports.

More about Teams will be explained in My Team Management Section

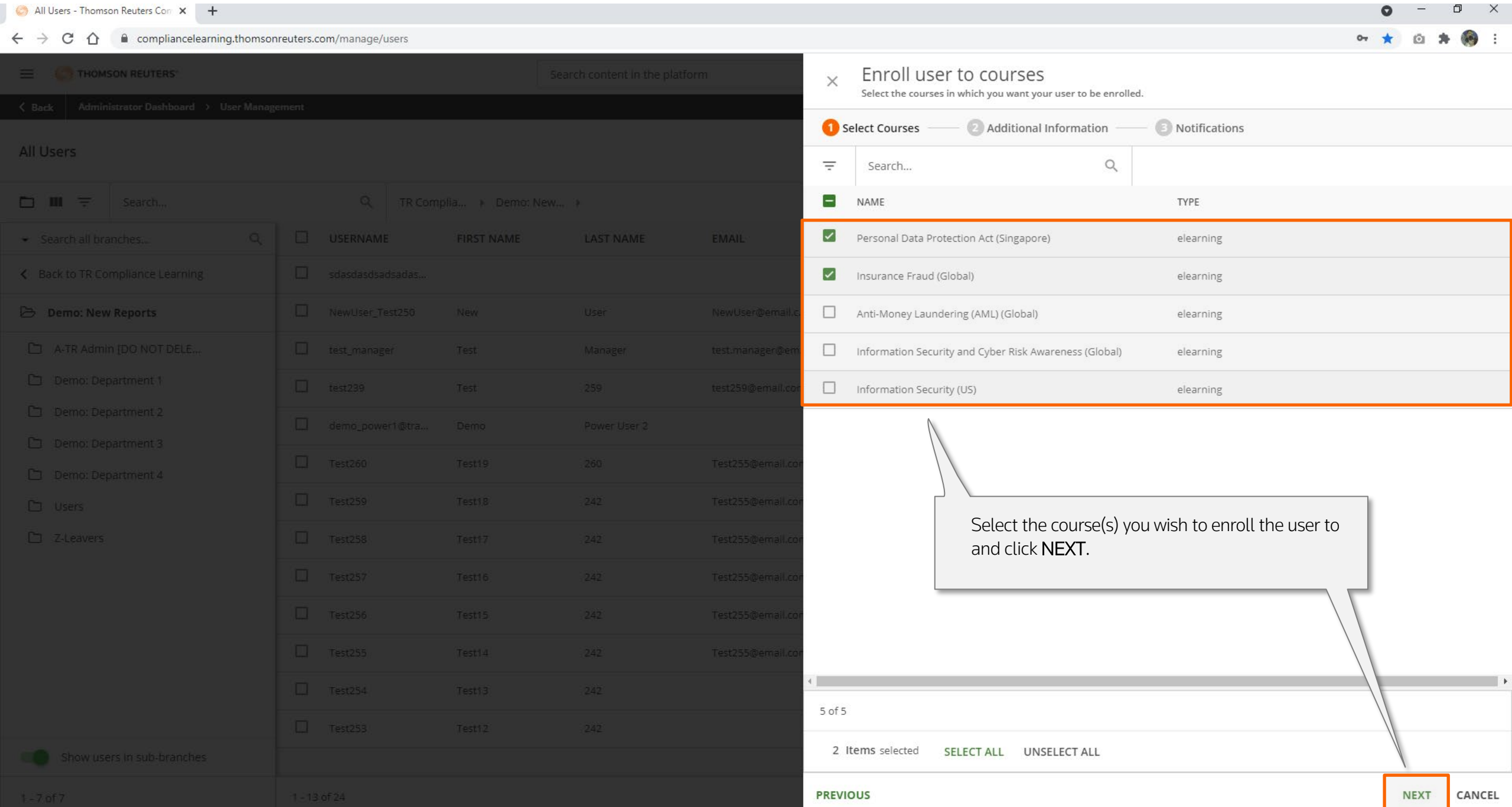
Adding a Single User (7)

Return to Menu



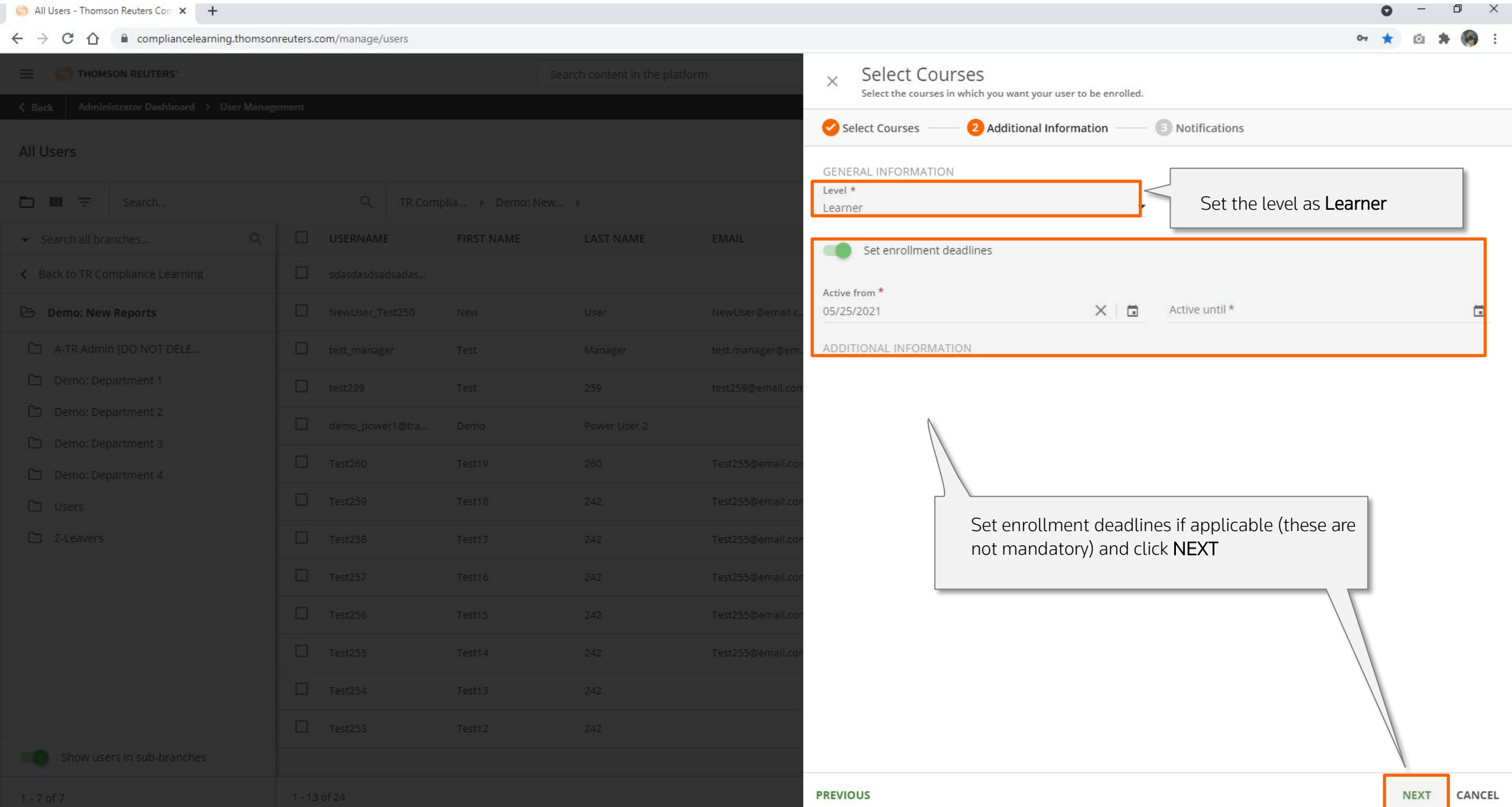
Adding a Single User (8)

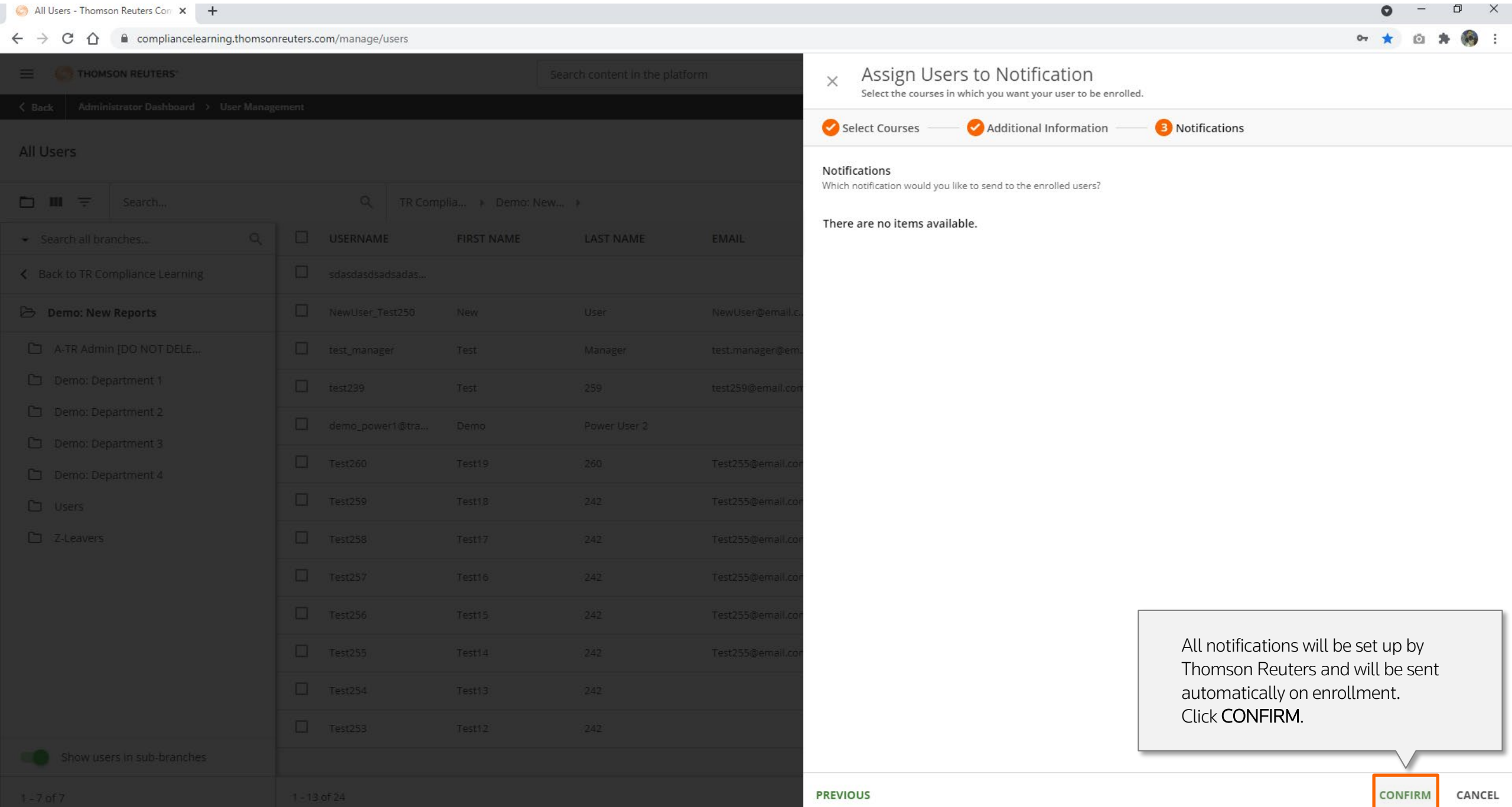
Return to Menu



Adding a Single User (9)

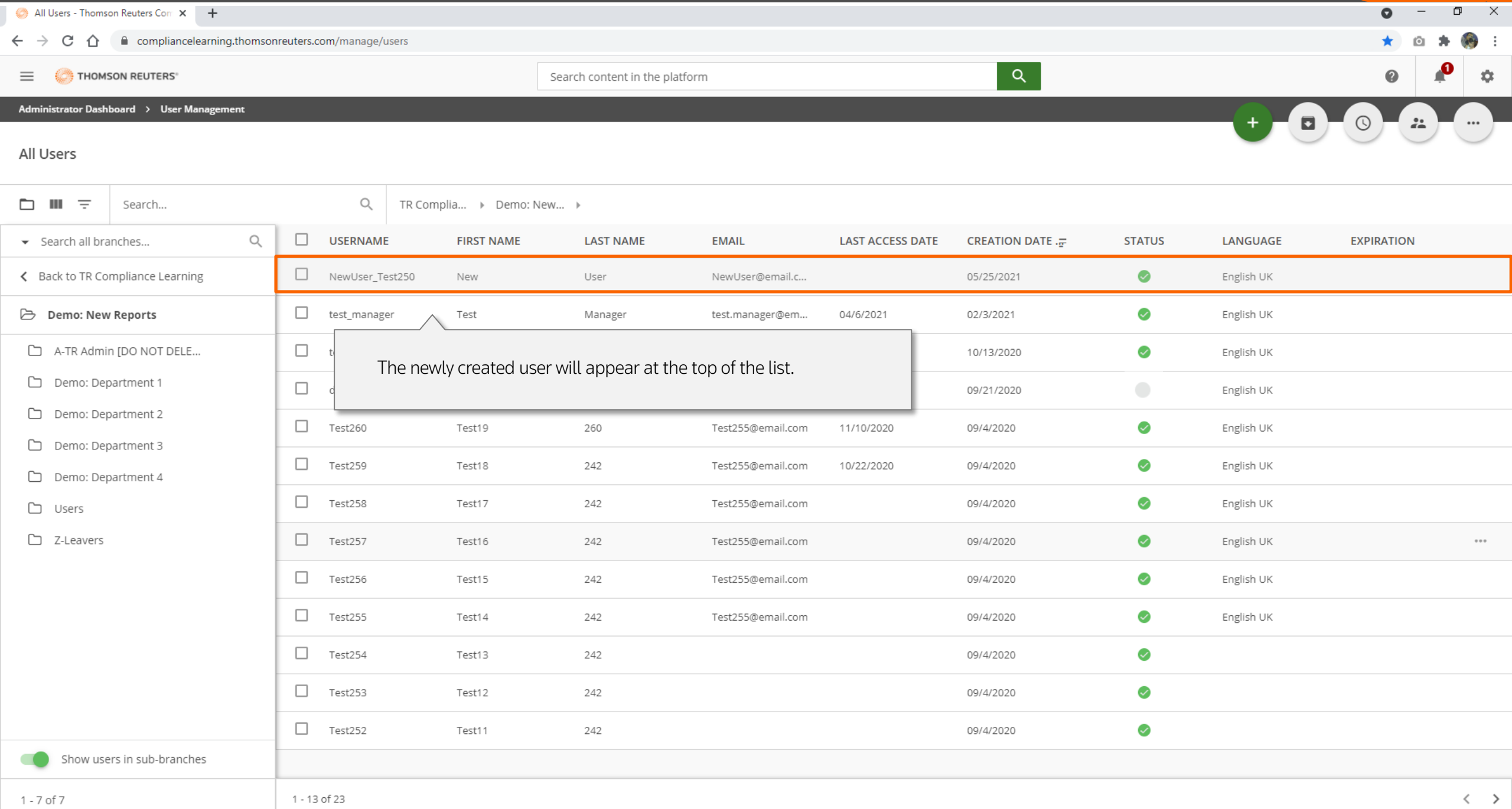
Return to Menu




All Users - Thomson Reuters Con
compliancelearning.thomsonreuters.com/manage/users
THOMSON REUTERS
Search content in the platform
Back
Administrator Dashboard
User Management
All Users
Search...
TR Complia...
Demo: New...
Search all branches...
Back to TR Compliance Learning
Demo: New Reports
A-TR Admin [DO NOT DELE...
Demo: Department 1
Demo: Department 2
Demo: Department 3
Demo: Department 4
Users
Z-Leavers
Show users in sub-branches
1 - 7 of 7
1 - 13 of 24
USERNAME
FIRST NAME
LAST NAME
EMAIL
sdasdasdsadsadas...
NewUser_Test250
New
User
test_manager
Test
Manager
test239
Test
259
demo_power1@tra...
Demo
Power User 2
Test260
Test19
260
Test259
Test18
242
Test258
Test17
242
Test257
Test16
242
Test256
Test15
242
Test255
Test14
242
Test254
Test13
242
Test253
Test12
242
Assign Users to Notification
Select the courses in which you want your user to be enrolled.
Select Courses
Additional Information
3
Notifications
Notifications
Which notification would you like to send to the enrolled users?
There are no items available.
All notifications will be set up by Thomson Reuters and will be sent automatically on enrollment.
Click CONFIRM.
PREVIOUS
CONFIRM
CANCEL

Adding a Single User (11)

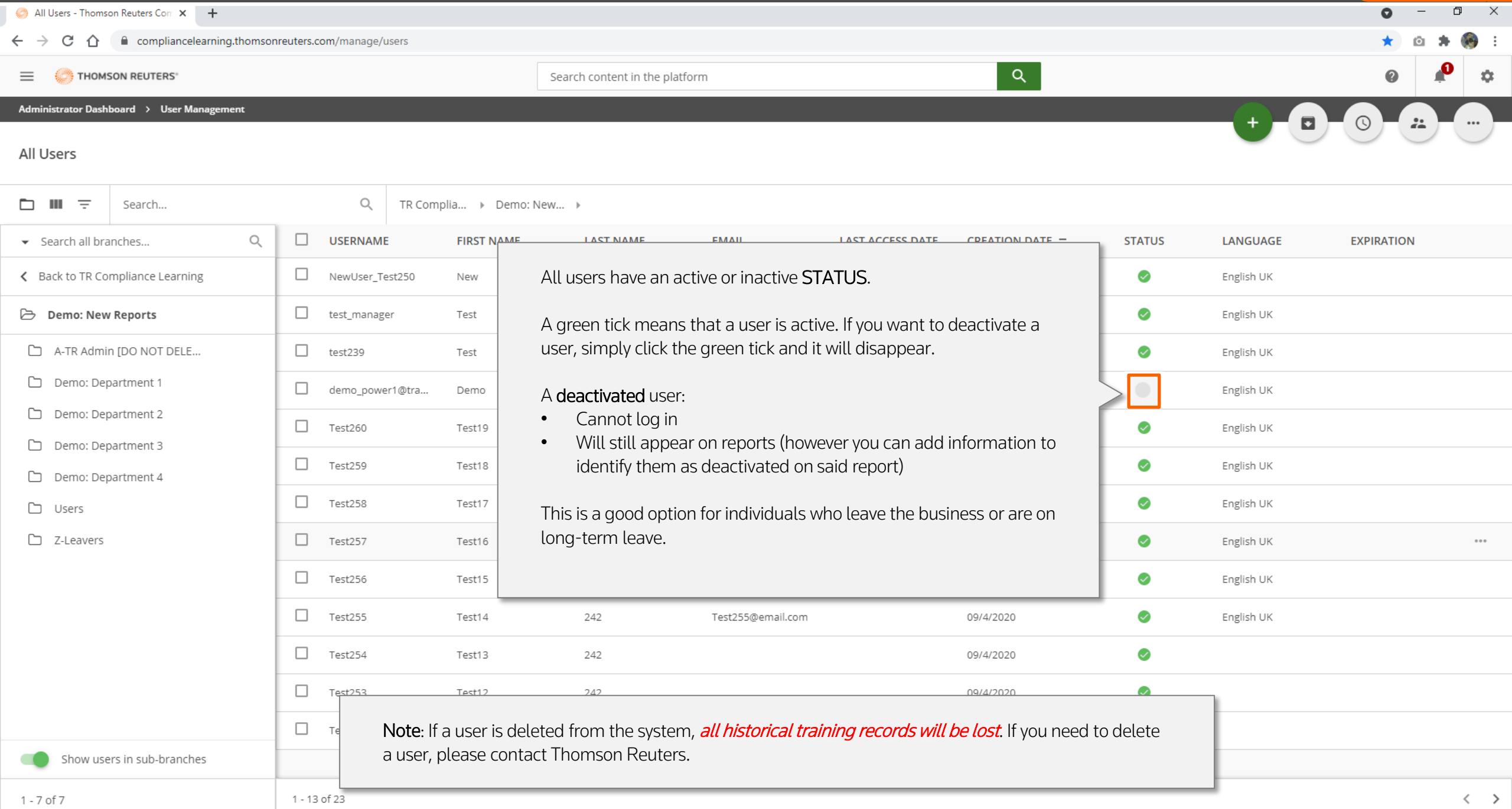
Return to Menu



The newly created user will appear at the top of the list.

Deactivating Users

Return to Menu



All users have an active or inactive **STATUS**.

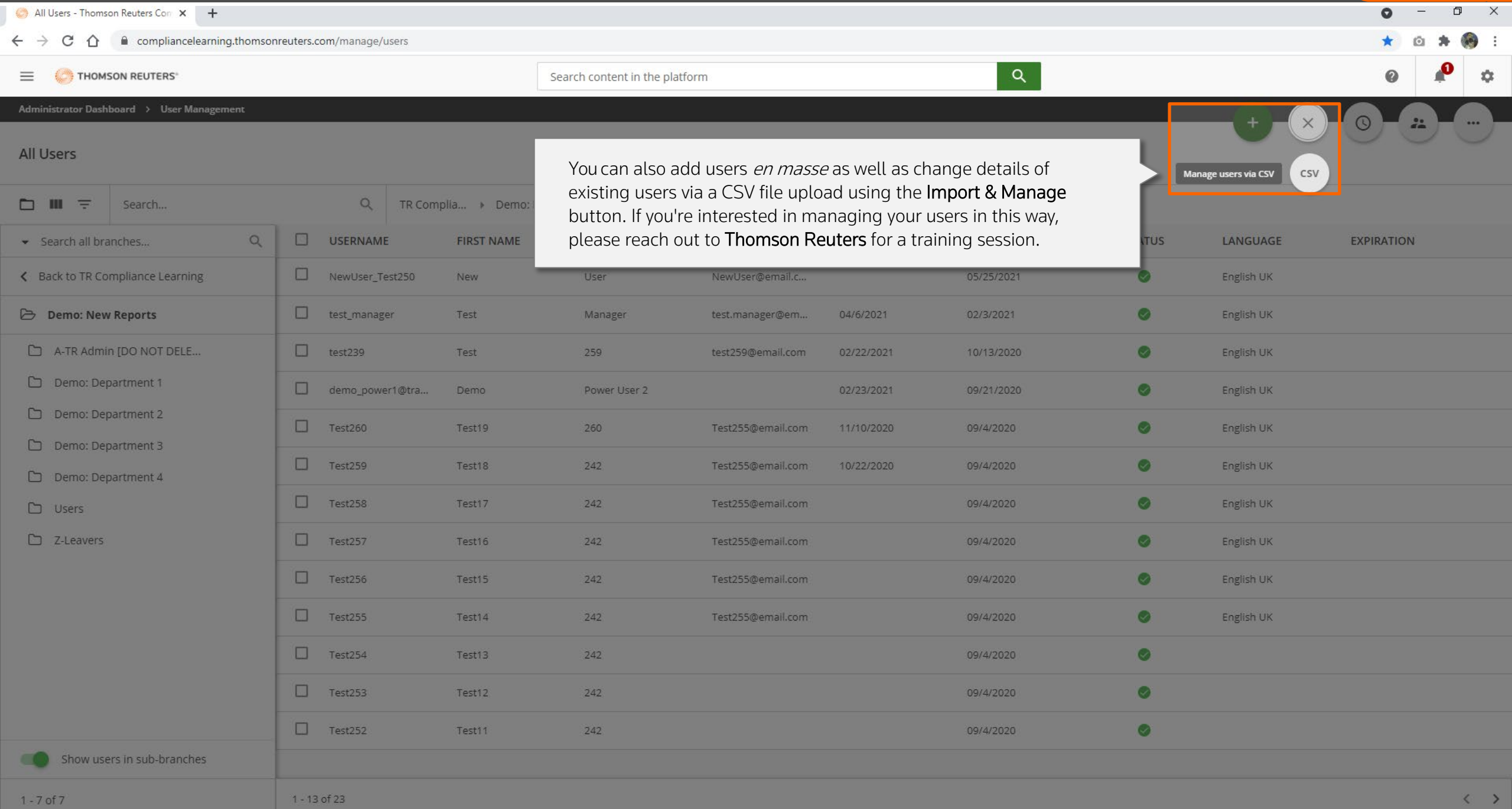
A green tick means that a user is active. If you want to deactivate a user, simply click the green tick and it will disappear.

A **deactivated** user:

- Cannot log in
- Will still appear on reports (however you can add information to identify them as deactivated on said report)

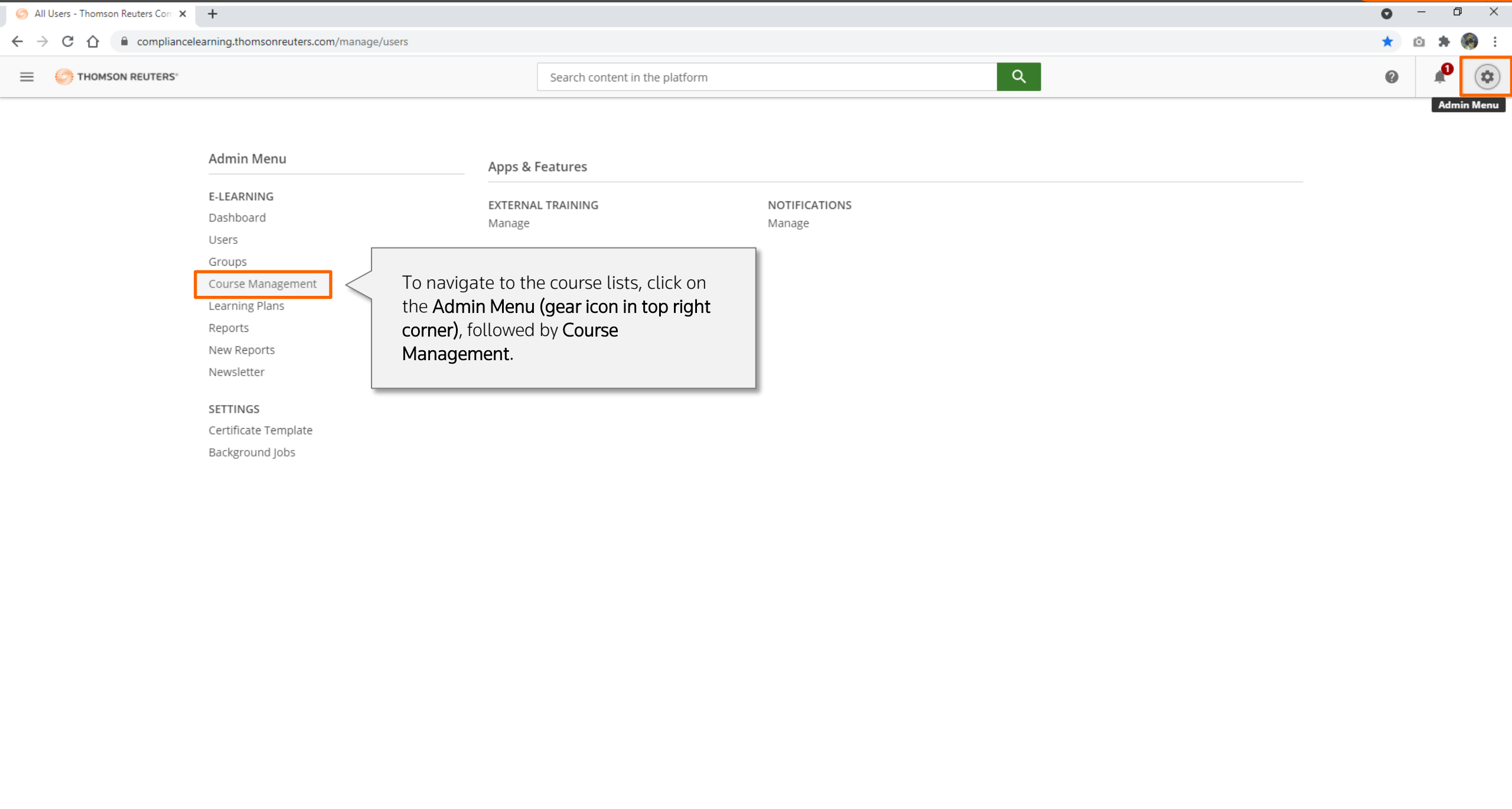
This is a good option for individuals who leave the business or are on long-term leave.

Note: If a user is deleted from the system, ***all historical training records will be lost***. If you need to delete a user, please contact Thomson Reuters.



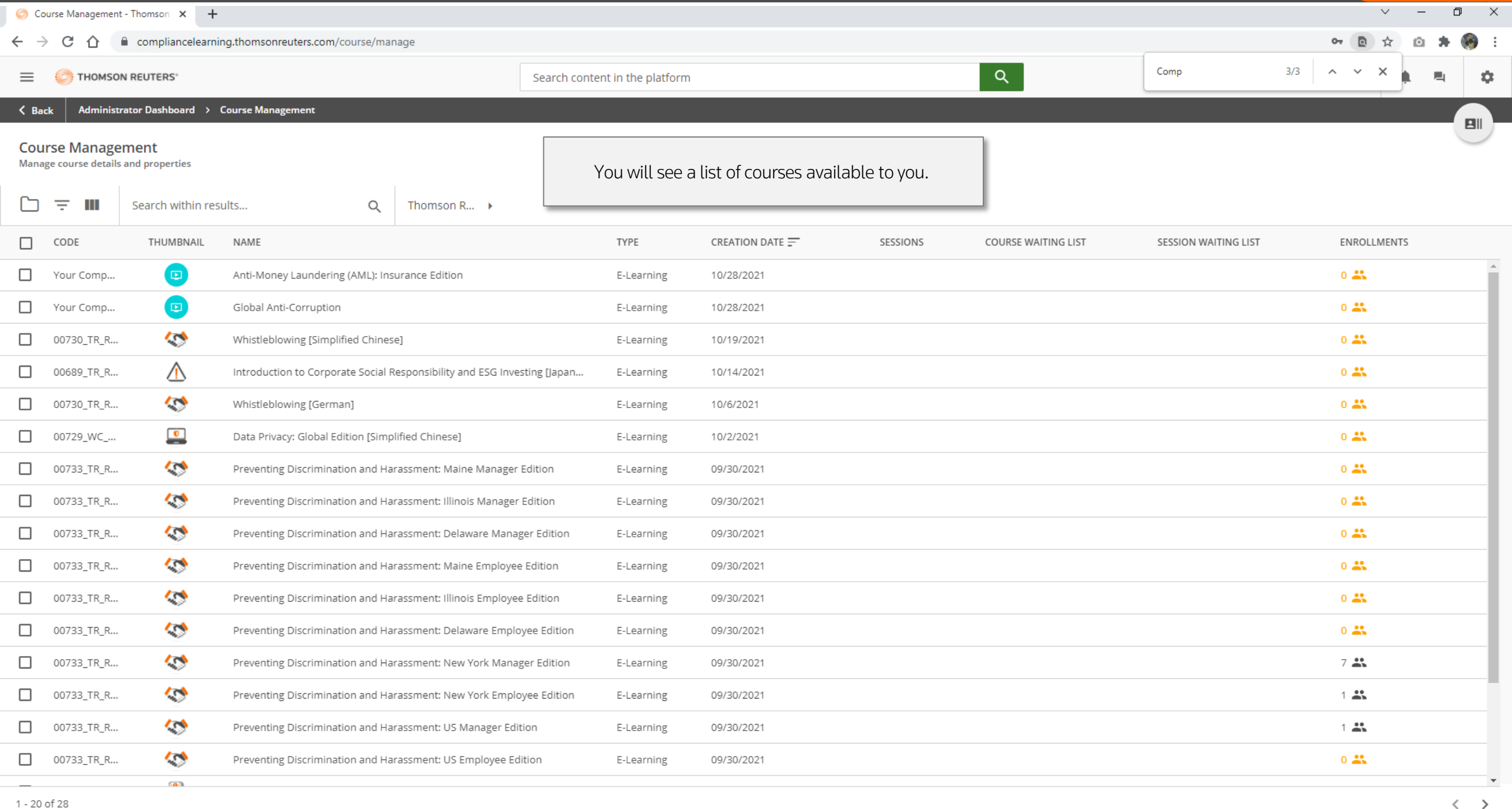
You can also add users *en masse* as well as change details of existing users via a CSV file upload using the **Import & Manage** button. If you're interested in managing your users in this way, please reach out to **Thomson Reuters** for a training session.

Course Management


All Users - Thomson Reuters Cor
compliancelearning.thomsonreuters.com/manage/users
THOMSON REUTERS
Search content in the platform
Admin Menu
Admin Menu
E-LEARNING
Dashboard
Users
Groups
Course Management
Learning Plans
Reports
New Reports
Newsletter
SETTINGS
Certificate Template
Background Jobs
Apps & Features
EXTERNAL TRAINING
Manage
NOTIFICATIONS
Manage
To navigate to the course lists, click on the Admin Menu (gear icon in top right corner), followed by Course Management.

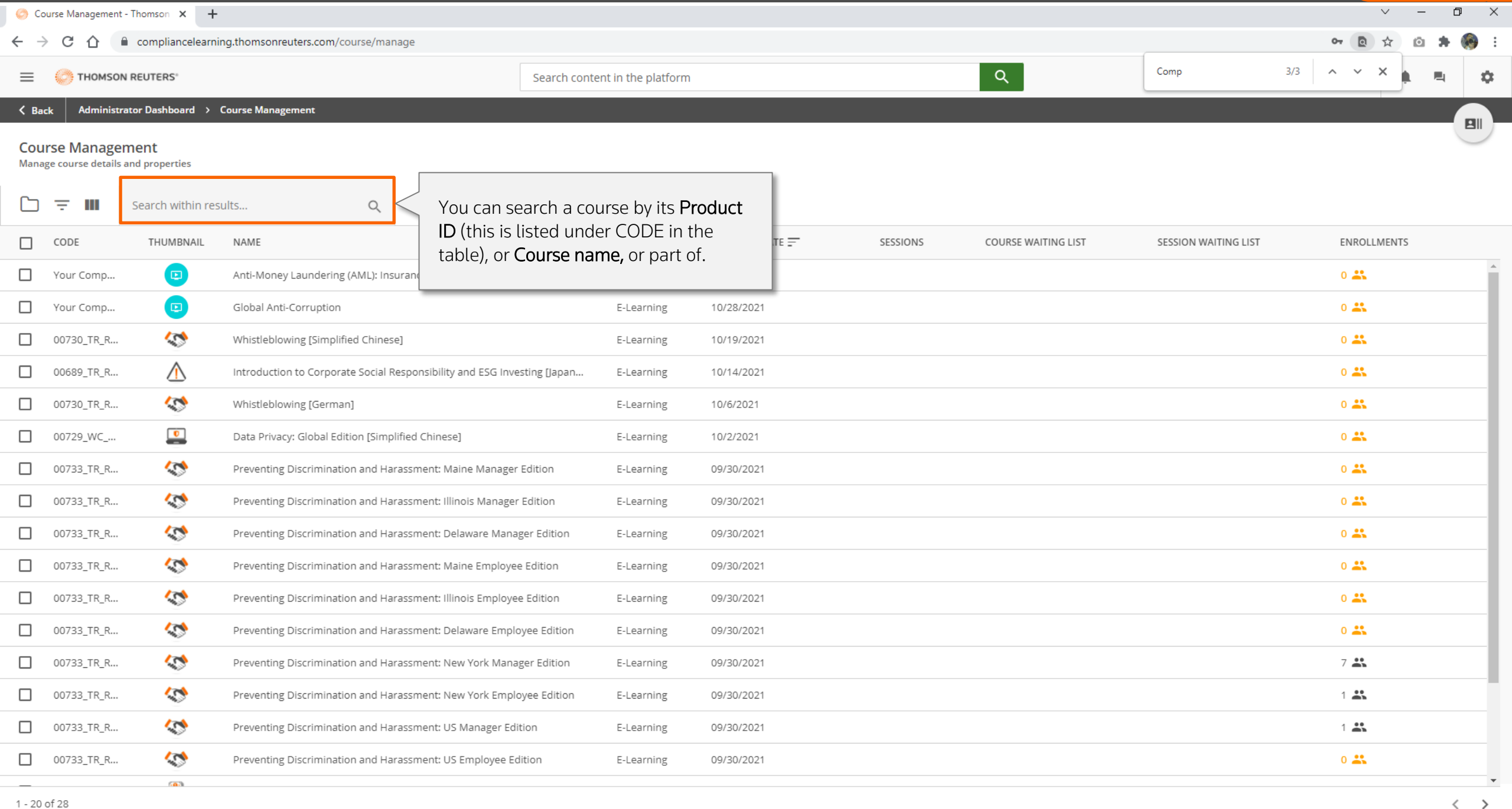
Searching for a Course (1)

Return to Menu



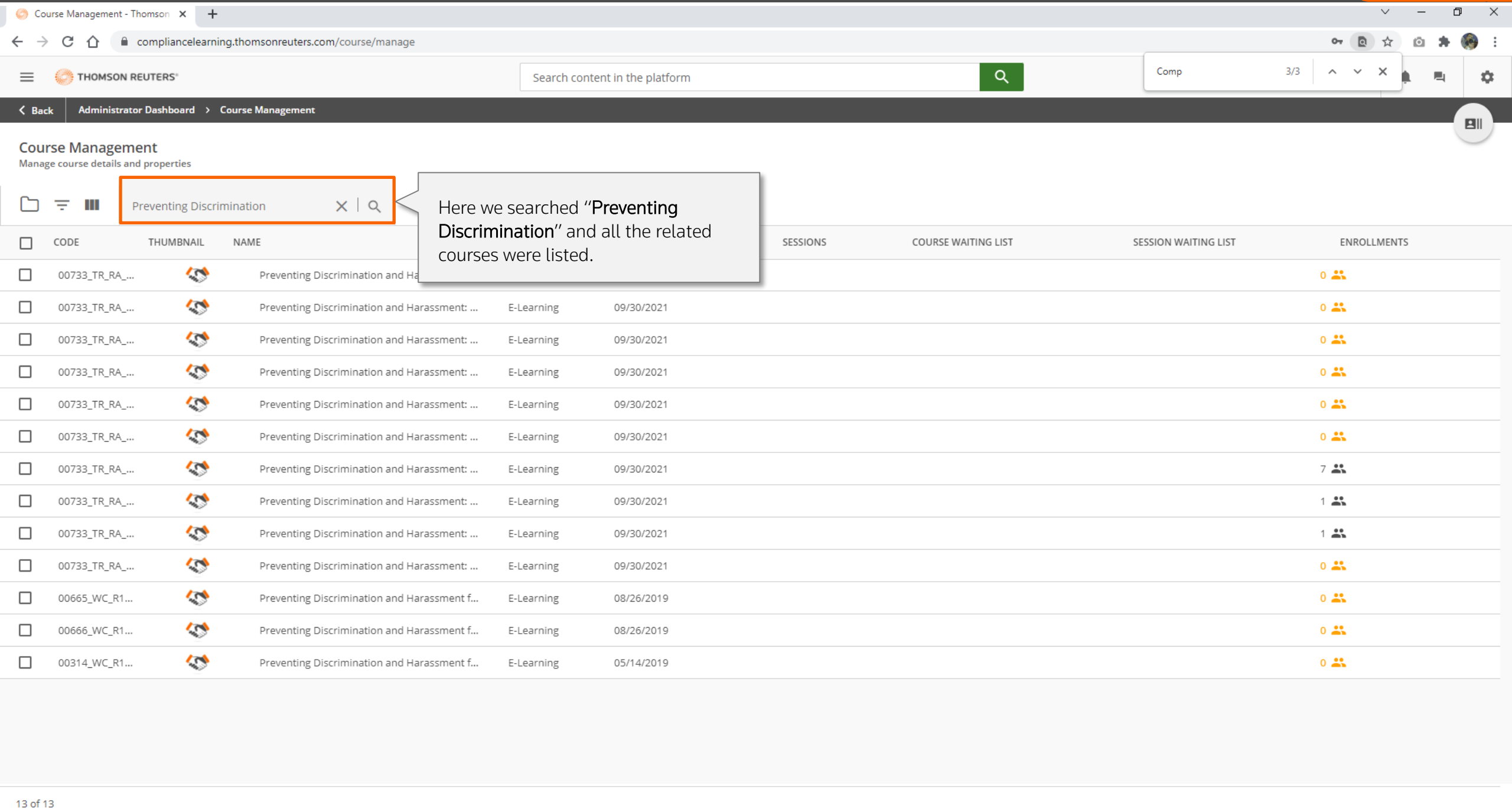
Searching for a Course (2)

Return to Menu



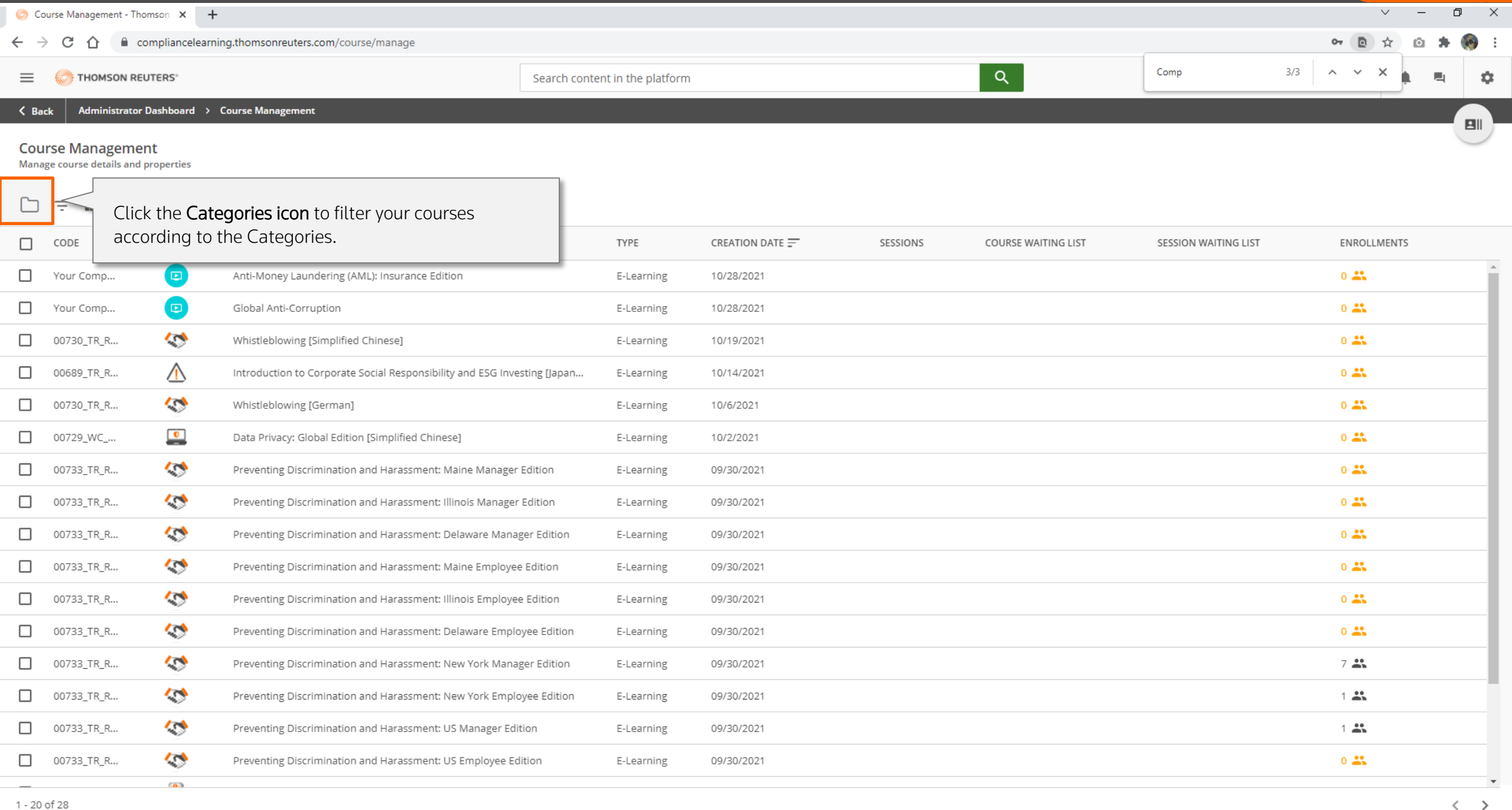
Searching for a Course (3)

Return to Menu



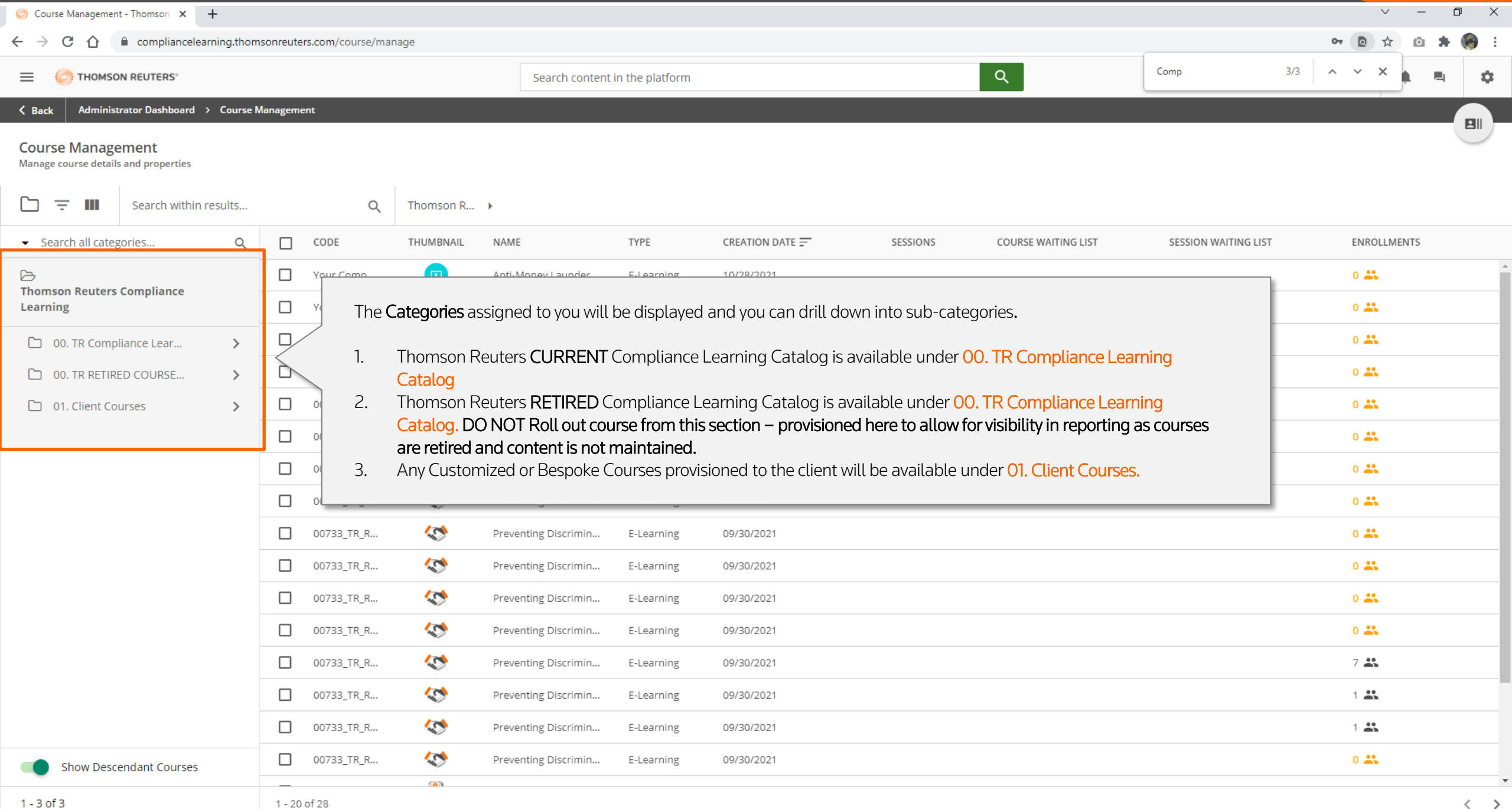
Filtering Courses by Categories (1)

Return to Menu



Filtering Courses by Categories (2)

Return to Menu

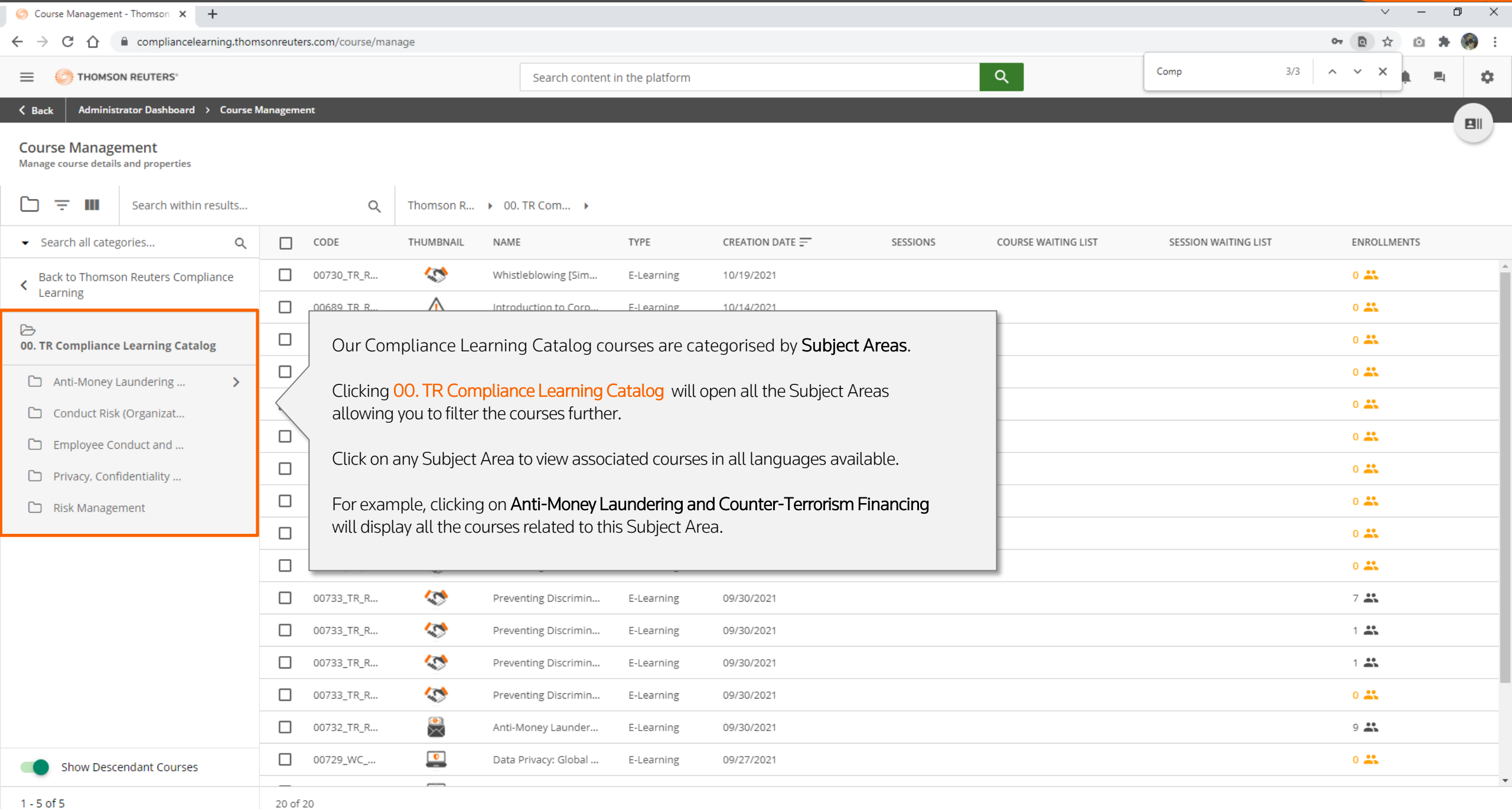


The **Categories** assigned to you will be displayed and you can drill down into sub-categories.

1. Thomson Reuters **CURRENT** Compliance Learning Catalog is available under 00. TR Compliance Learning Catalog
2. Thomson Reuters **RETIRED** Compliance Learning Catalog is available under 00. TR Compliance Learning Catalog. **DO NOT Roll out course from this section – provisioned here to allow for visibility in reporting as courses are retired and content is not maintained.**
3. Any Customized or Bespoke Courses provisioned to the client will be available under 01. Client Courses.

Filtering Courses by Categories (3)

Return to Menu



Our Compliance Learning Catalog courses are categorised by **Subject Areas**.

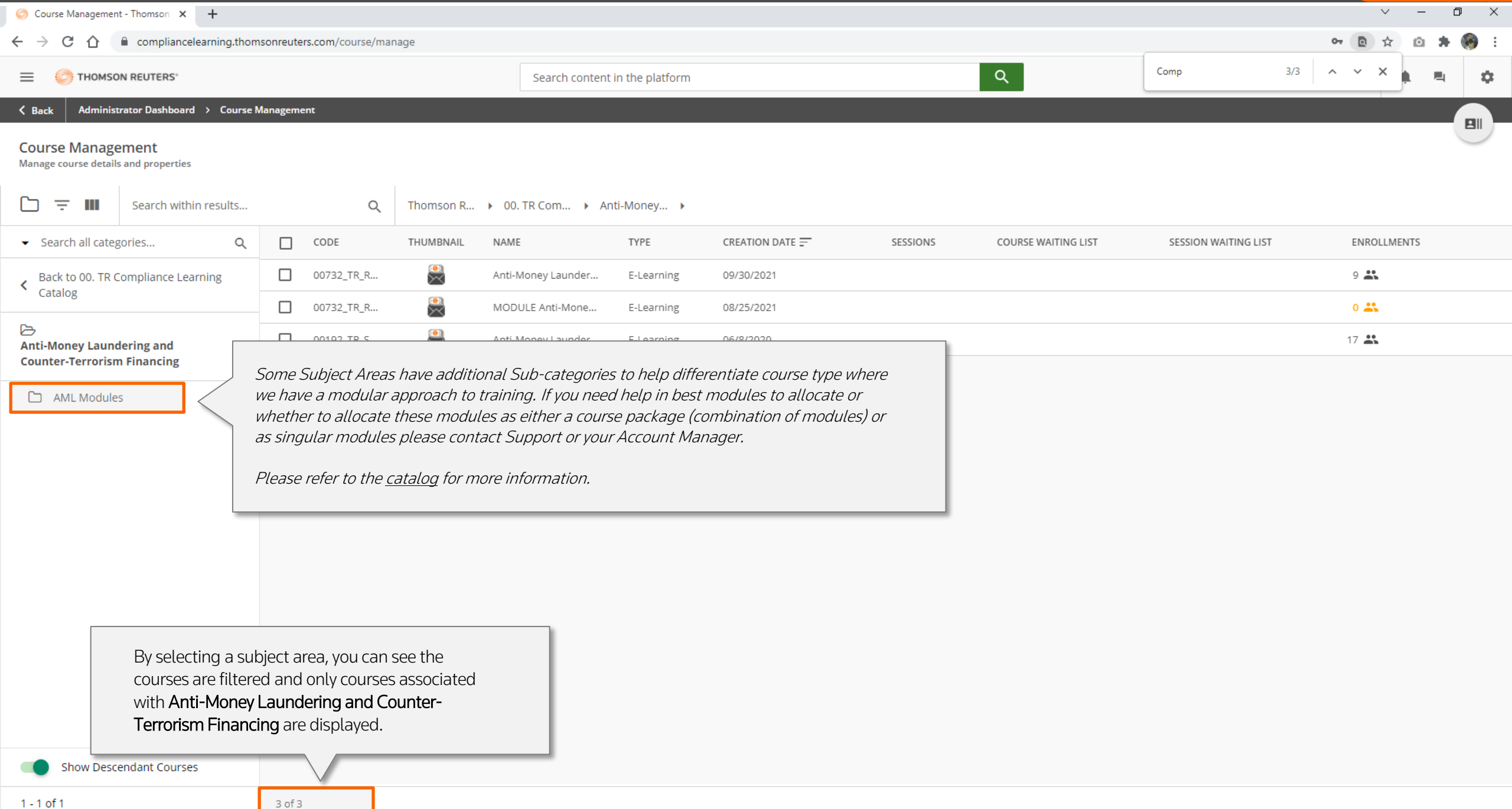
Clicking 00. TR Compliance Learning Catalog will open all the Subject Areas allowing you to filter the courses further.

Click on any Subject Area to view associated courses in all languages available.

For example, clicking on **Anti-Money Laundering and Counter-Terrorism Financing** will display all the courses related to this Subject Area.

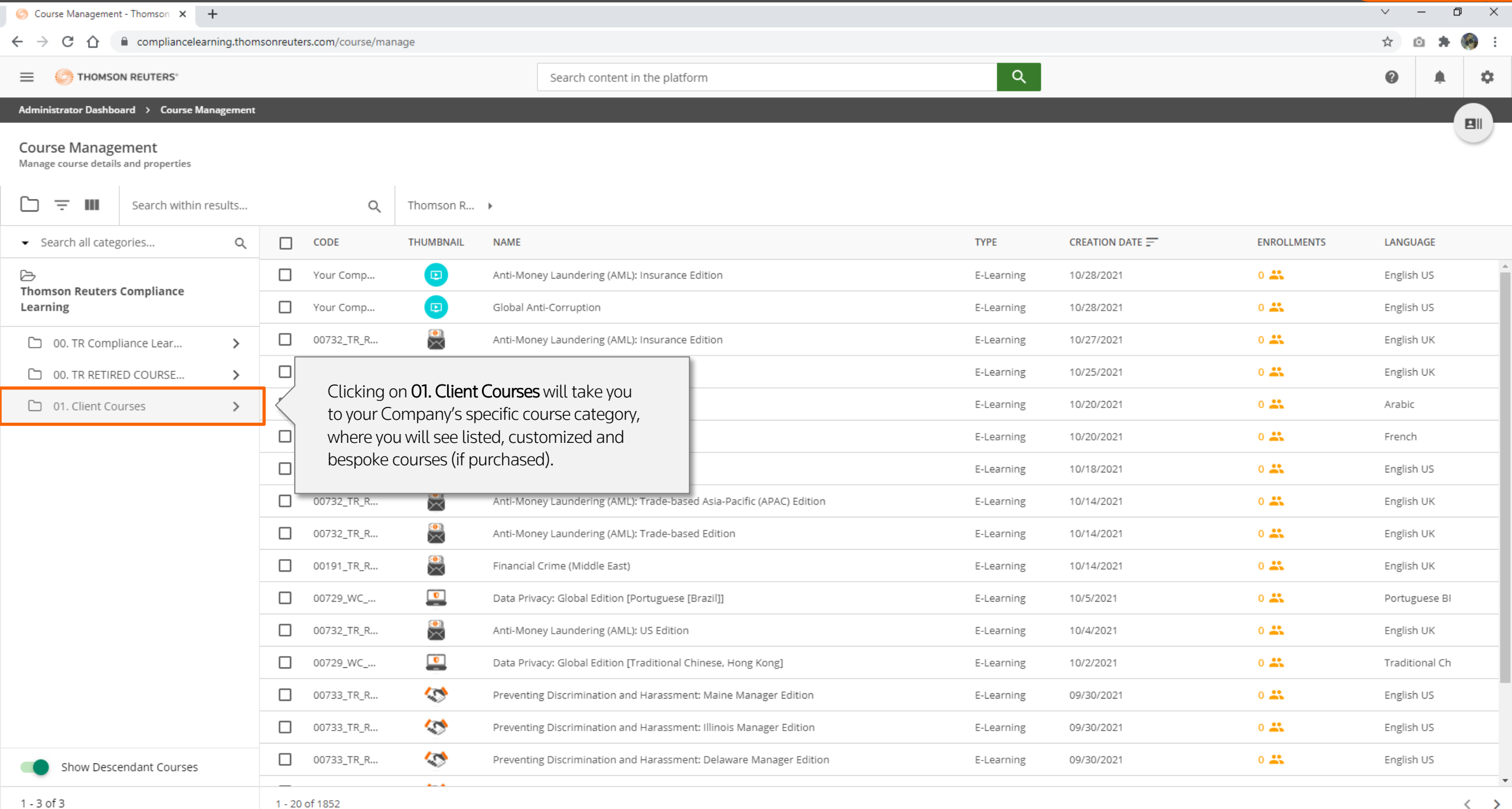
Filtering Courses by Categories (4)

Return to Menu



Filtering Client Courses (1)

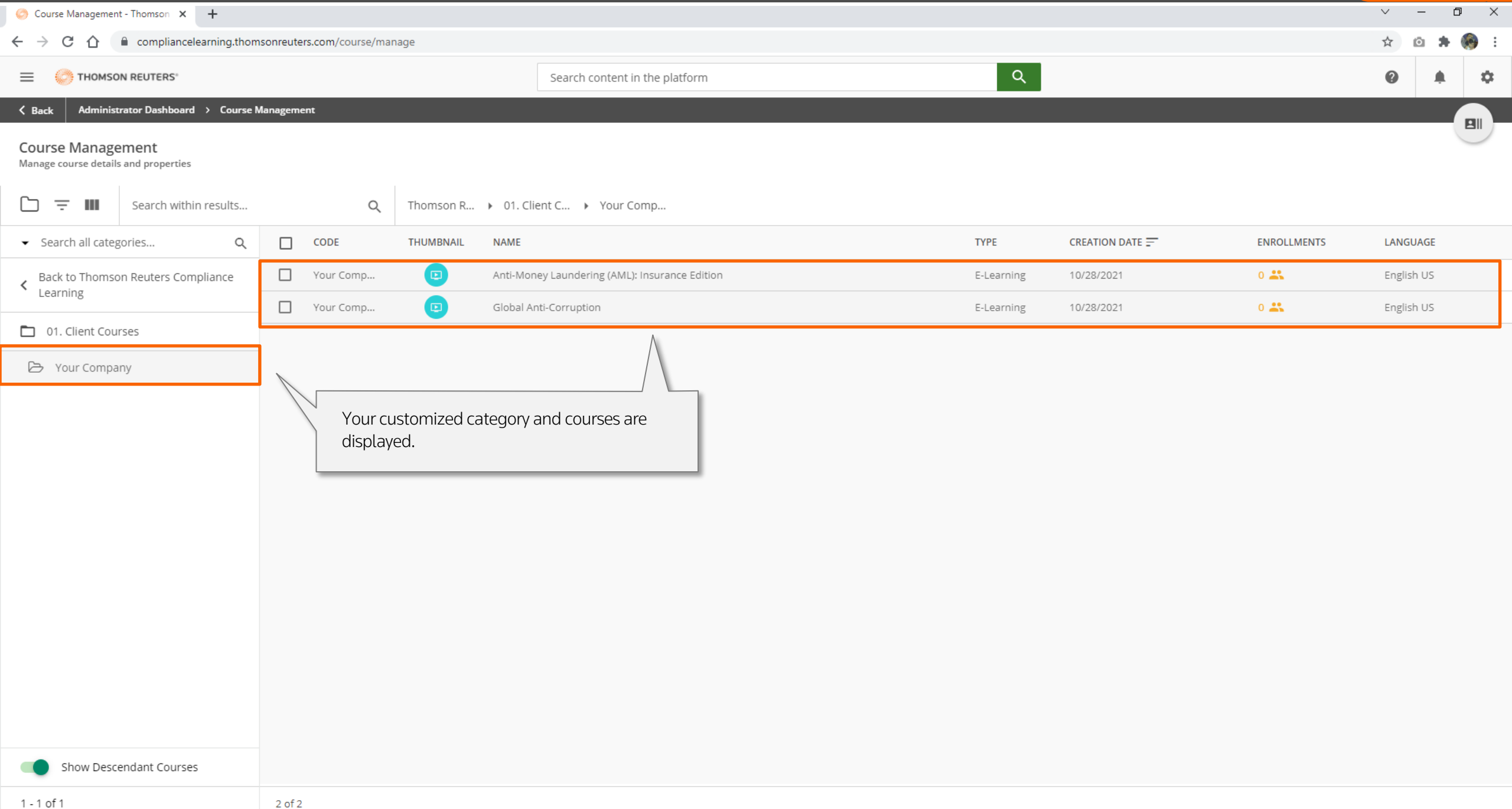
Return to Menu



CODE	THUMBNAIL	NAME	TYPE	CREATION DATE	ENROLLMENTS	LANGUAGE
Your Comp...		Anti-Money Laundering (AML): Insurance Edition	E-Learning	10/28/2021	0	English US
Your Comp...		Global Anti-Corruption	E-Learning	10/28/2021	0	English US
00732_TR_R...		Anti-Money Laundering (AML): Insurance Edition	E-Learning	10/27/2021	0	English UK
			E-Learning	10/25/2021	0	English UK
			E-Learning	10/20/2021	0	Arabic
			E-Learning	10/20/2021	0	French
			E-Learning	10/18/2021	0	English US
00732_TR_R...		Anti-Money Laundering (AML): Trade-based Asia-Pacific (APAC) Edition	E-Learning	10/14/2021	0	English UK
00732_TR_R...		Anti-Money Laundering (AML): Trade-based Edition	E-Learning	10/14/2021	0	English UK
00191_TR_R...		Financial Crime (Middle East)	E-Learning	10/14/2021	0	English UK
00729_WC_...		Data Privacy: Global Edition [Portuguese [Brazil]]	E-Learning	10/5/2021	0	Portuguese BI
00732_TR_R...		Anti-Money Laundering (AML): US Edition	E-Learning	10/4/2021	0	English UK
00729_WC_...		Data Privacy: Global Edition [Traditional Chinese, Hong Kong]	E-Learning	10/2/2021	0	Traditional Ch
00733_TR_R...		Preventing Discrimination and Harassment: Maine Manager Edition	E-Learning	09/30/2021	0	English US
00733_TR_R...		Preventing Discrimination and Harassment: Illinois Manager Edition	E-Learning	09/30/2021	0	English US
00733_TR_R...		Preventing Discrimination and Harassment: Delaware Manager Edition	E-Learning	09/30/2021	0	English US

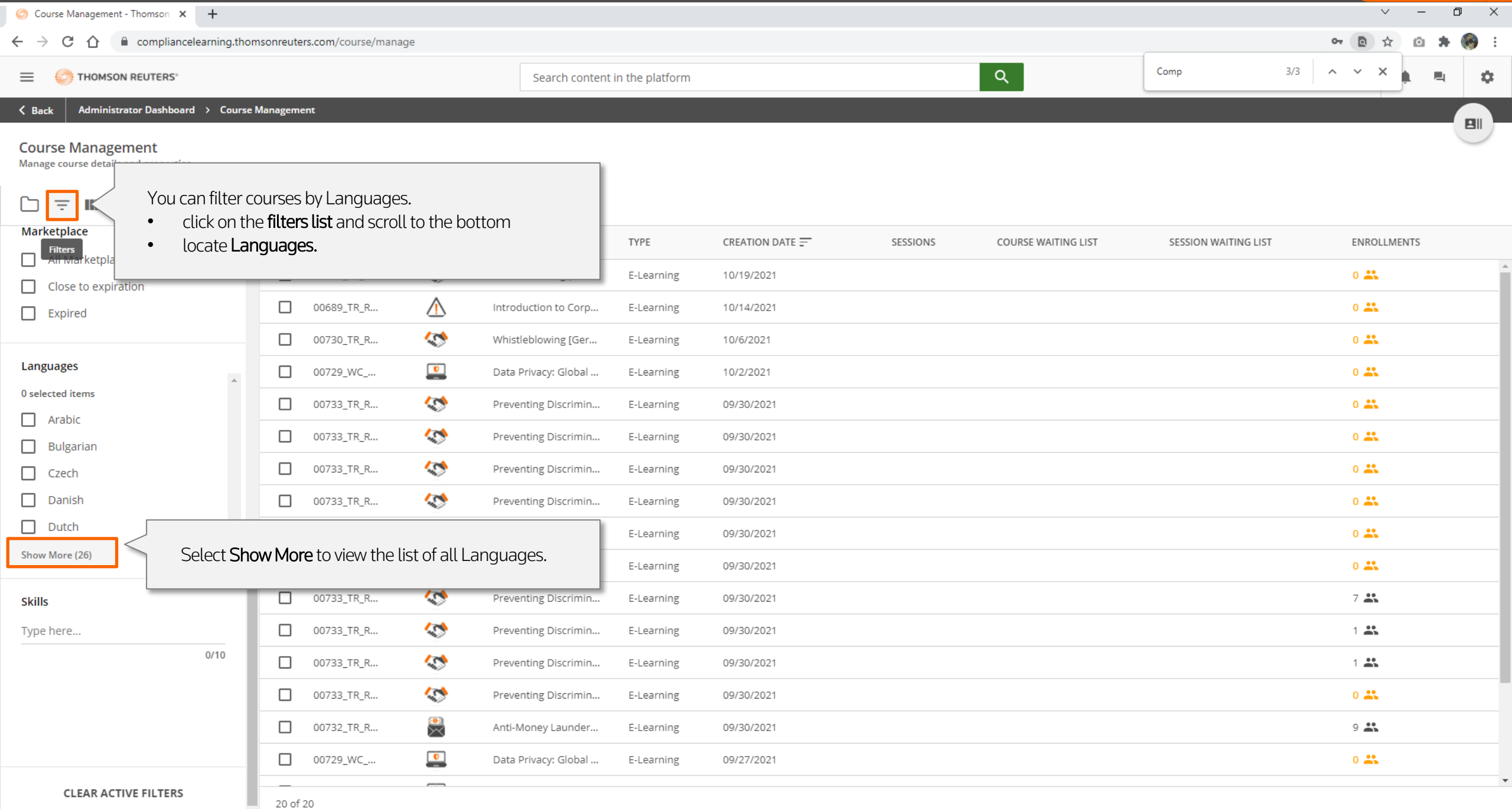
Filtering Client Courses (2)

Return to Menu



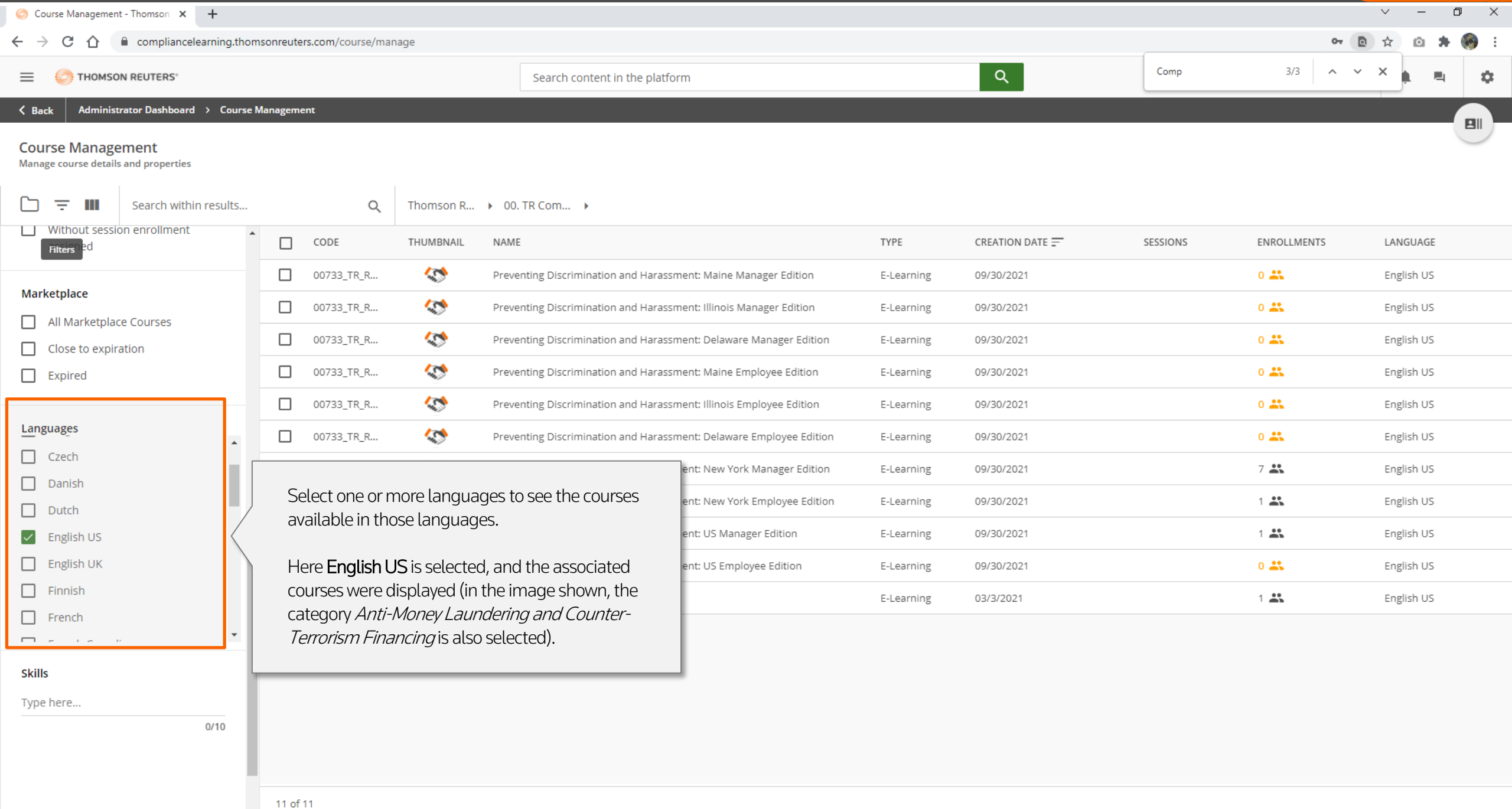
Filtering Courses by language (1)

Return to Menu



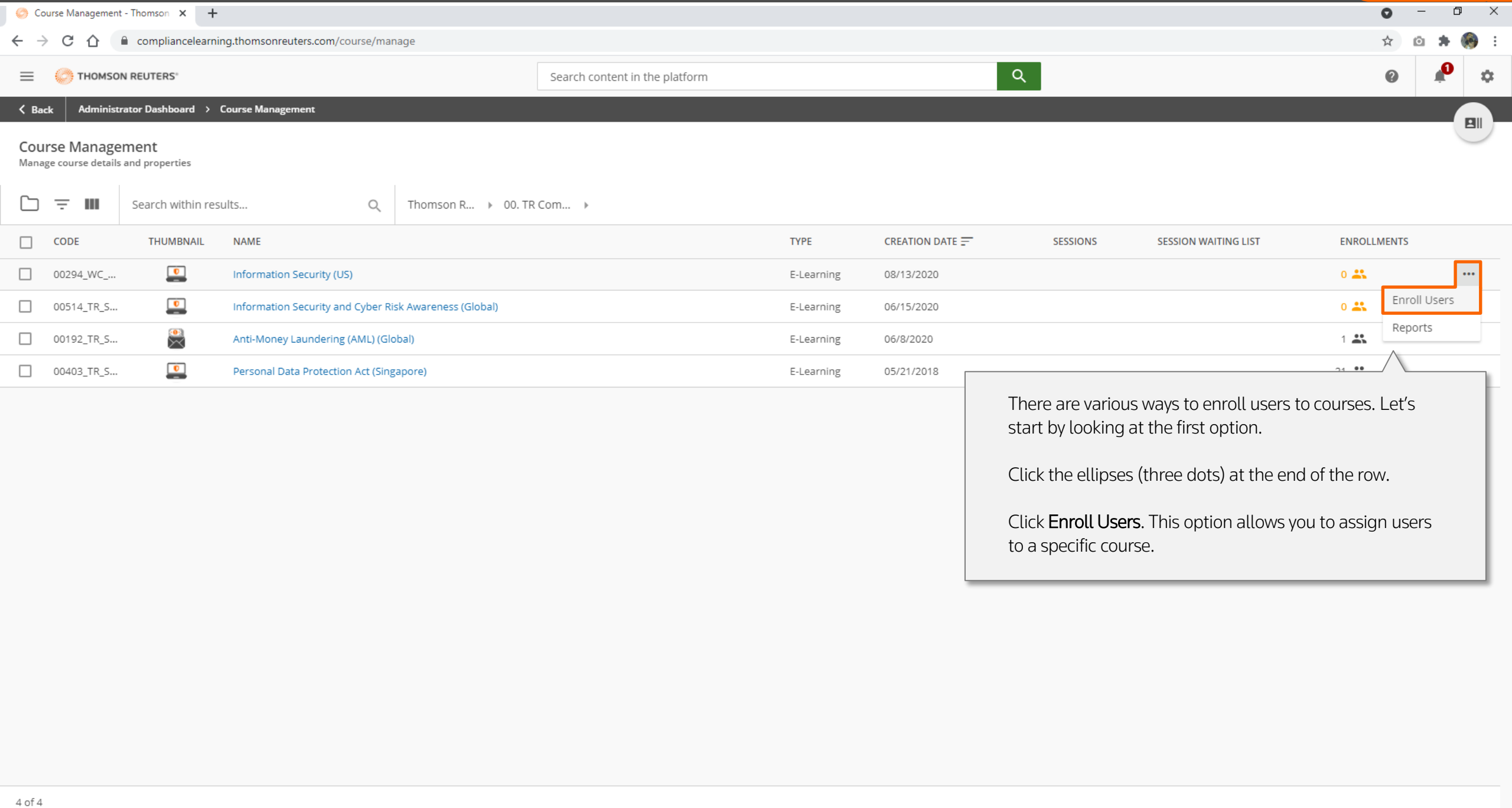
Filtering Courses by language (2)

Return to Menu



Select one or more languages to see the courses available in those languages.

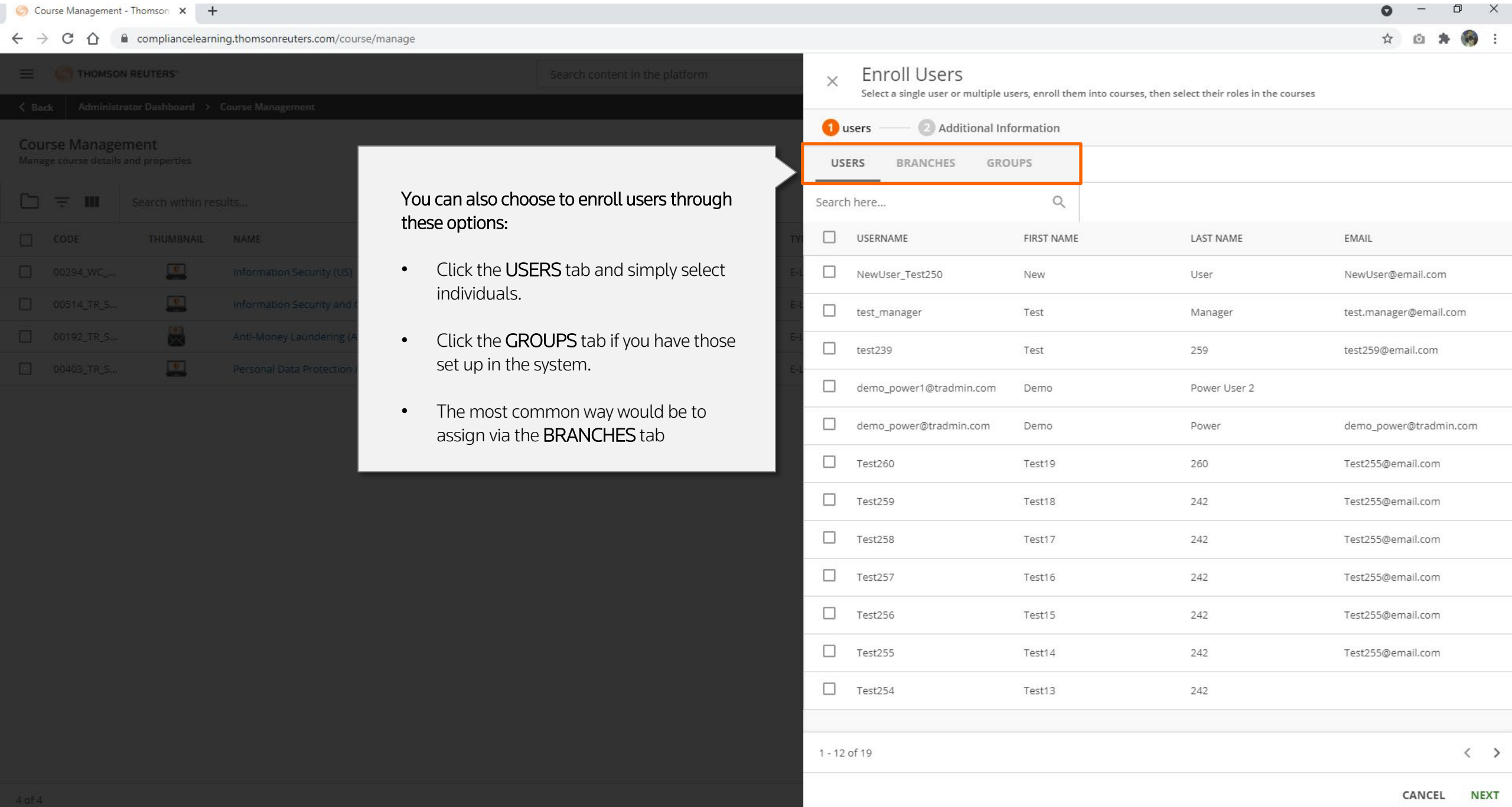
Here **English US** is selected, and the associated courses were displayed (in the image shown, the category *Anti-Money Laundering and Counter-Terrorism Financing* is also selected).



There are various ways to enroll users to courses. Let's start by looking at the first option.

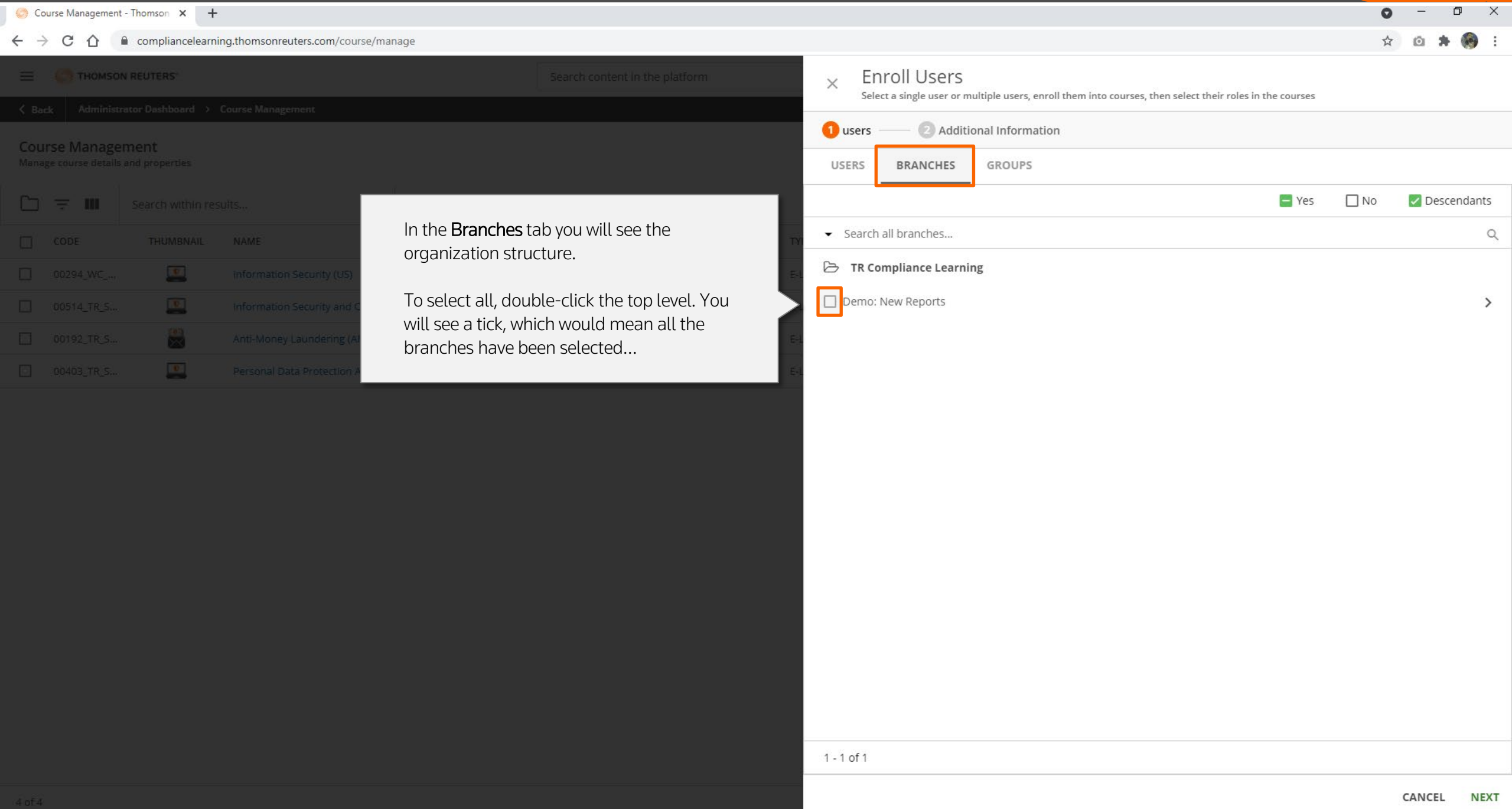
Click the ellipses (three dots) at the end of the row.

Click **Enroll Users**. This option allows you to assign users to a specific course.



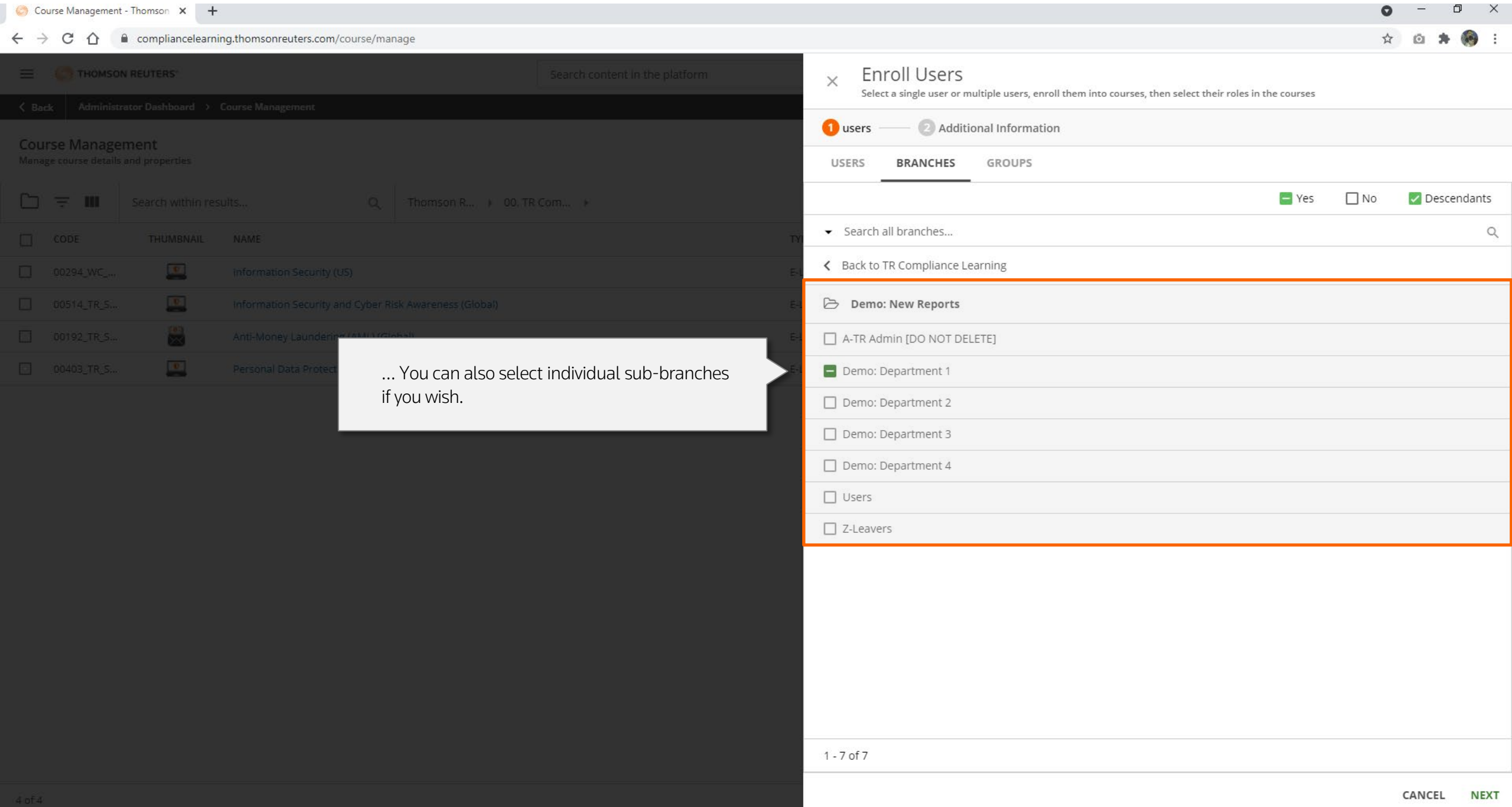
You can also choose to enroll users through these options:

- Click the **USERS** tab and simply select individuals.
- Click the **GROUPS** tab if you have those set up in the system.
- The most common way would be to assign via the **BRANCHES** tab



In the **Branches** tab you will see the organization structure.

To select all, double-click the top level. You will see a tick, which would mean all the branches have been selected...


Course Management - Thomson
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THOMSON REUTERS
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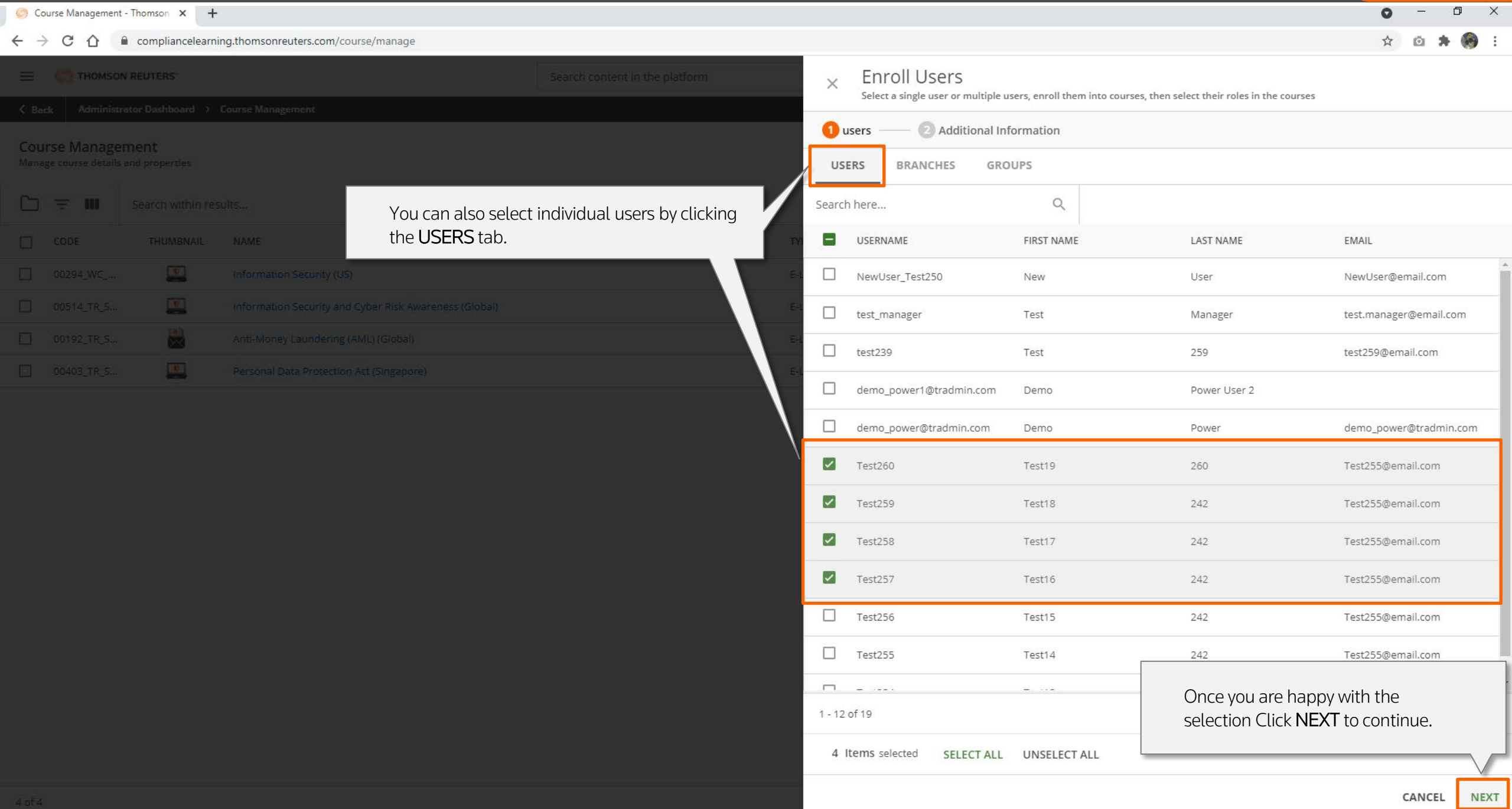
Back
Administrator Dashboard
Course Management
Course Management
Manage course details and properties
Search within results...
Thomson R...
00. TR Com...
CODE
THUMBNAIL
NAME
00294_WC_...
Information Security (US)
00514_TR_S...
Information Security and Cyber Risk Awareness (Global)
00192_TR_S...
00403_TR_S...
Personal Data Protect
4 of 4
... You can also select individual sub-branches if you wish.
Enroll Users
Select a single user or multiple users, enroll them into courses, then select their roles in the courses
1 users
2 Additional Information
USERS
BRANCHES
GROUPS
Yes
No
Descendants
Search all branches...
Back to TR Compliance Learning
Demo: New Reports
A-TR Admin [DO NOT DELETE]
Demo: Department 1
Demo: Department 2
Demo: Department 3
Demo: Department 4
Users
Z-Leavers
1 - 7 of 7
CANCEL
NEXT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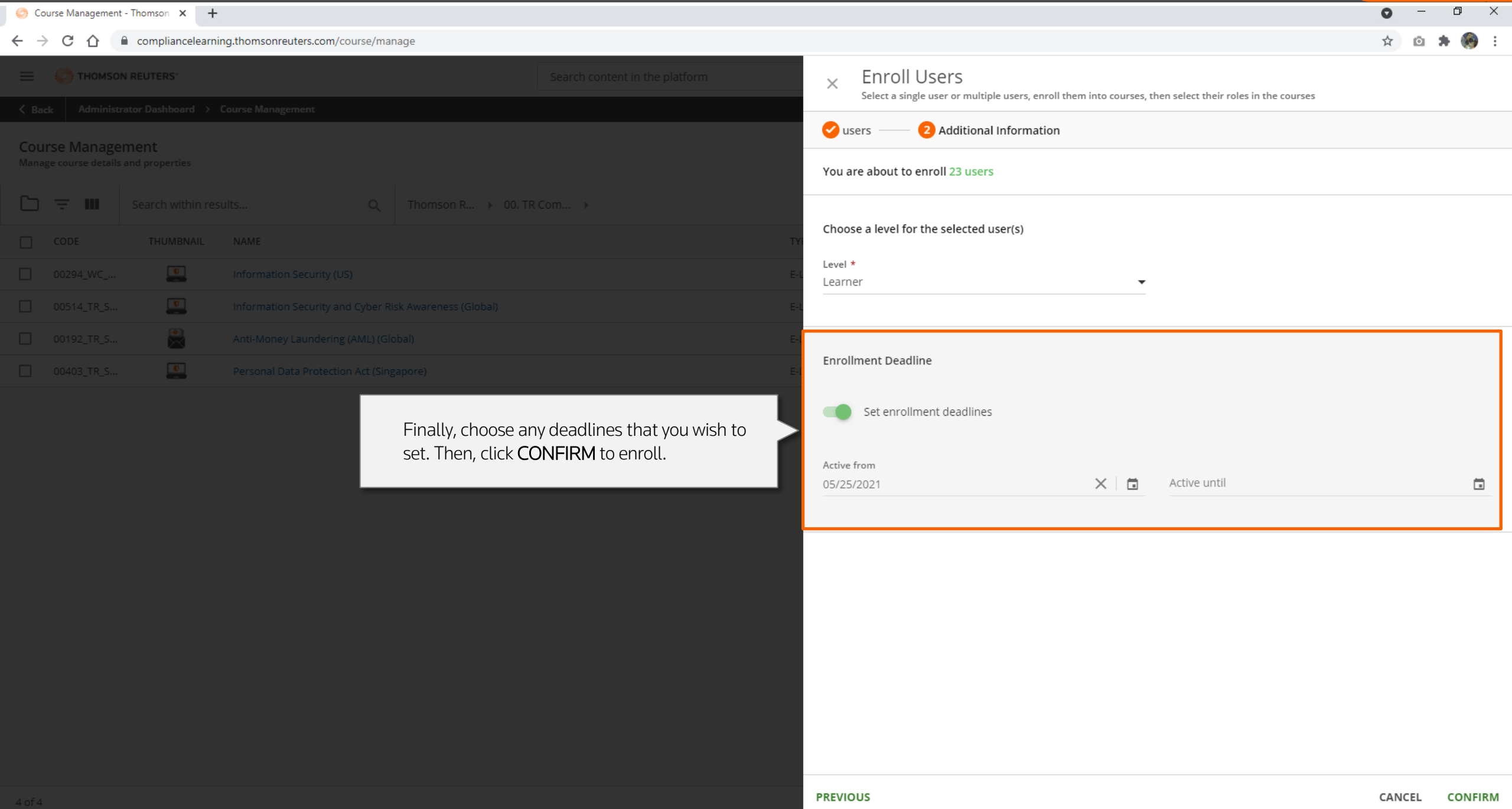
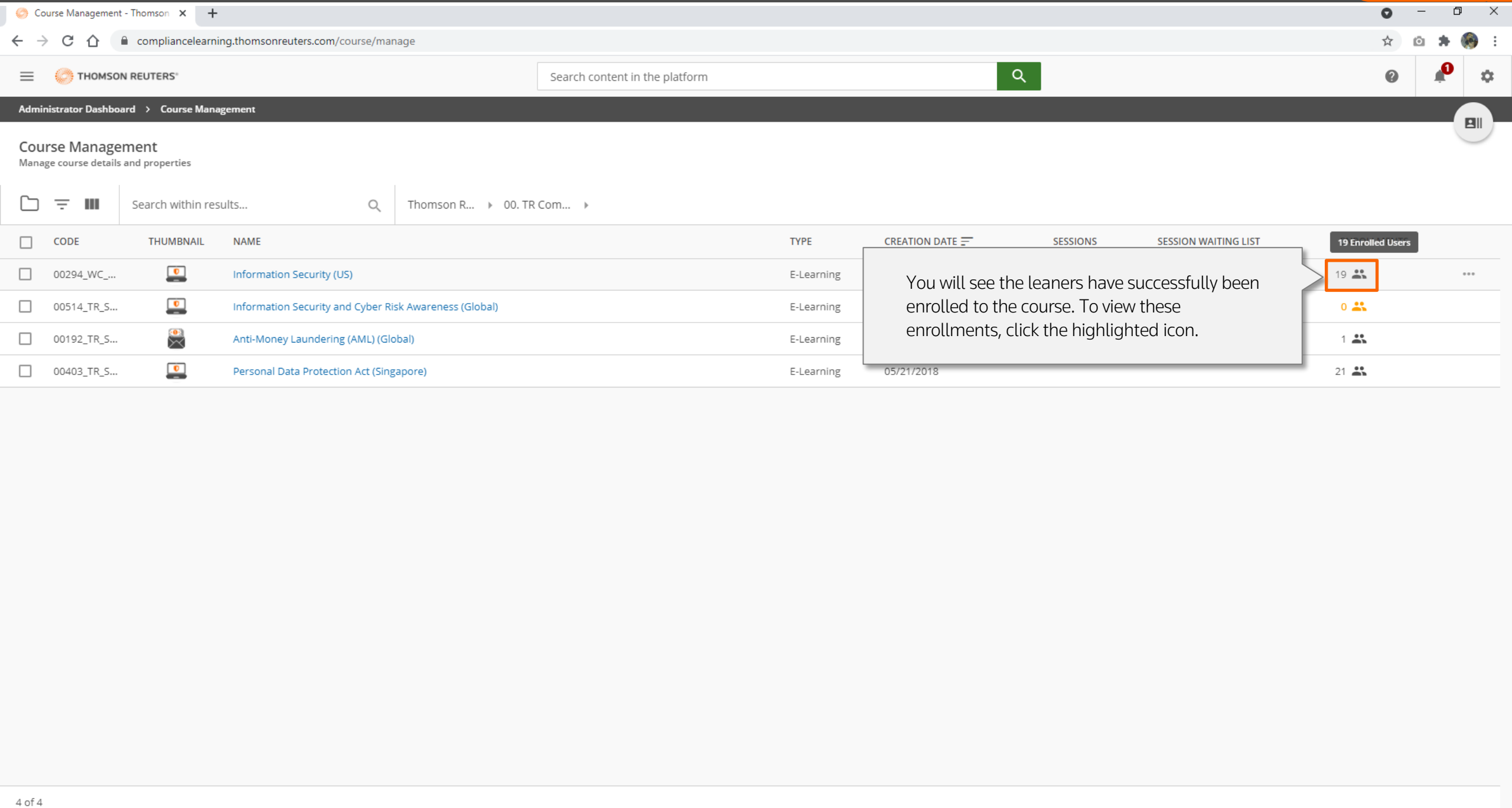
Administrator Dashboard
Course Management
Course Management
Manage course details and properties
Search within results...
CODE
THUMBNAIL
NAME
00294_WC_...
Information Security (US)
00514_TR_S...
Information Security and Cyber Risk Awareness (Global)
00192_TR_S...
Anti-Money Laundering (AML) (Global)
00403_TR_S...
Personal Data Protection Act (Singapore)
4 of 4
You can also select individual users by clicking the USERS tab.
Enroll Users
Select a single user or multiple users, enroll them into courses, then select their roles in the courses
1 users
2 Additional Information
USERS
BRANCHES
GROUPS
Search here...
USERNAME
FIRST NAME
LAST NAME
EMAIL
NewUser_Test250
New
User
NewUser@email.com
test_manager
Test
Manager
test.manager@email.com
test239
Test
259
test259@email.com
demo_power1@tradmin.com
Demo
Power User 2
demo_power@tradmin.com
Demo
Power
demo_power@tradmin.com
Test260
Test19
260
Test255@email.com
Test259
Test18
242
Test255@email.com
Test258
Test17
242
Test255@email.com
Test257
Test16
242
Test255@email.com
Test256
Test15
242
Test255@email.com
Test255
Test14
242
Test255@email.com
1 - 12 of 19
4 Items selected
SELECT ALL
UNSELECT ALL
Once you are happy with the selection Click NEXT to continue.
CANCEL
NEXT



Finally, choose any deadlines that you wish to set. Then, click **CONFIRM** to enroll.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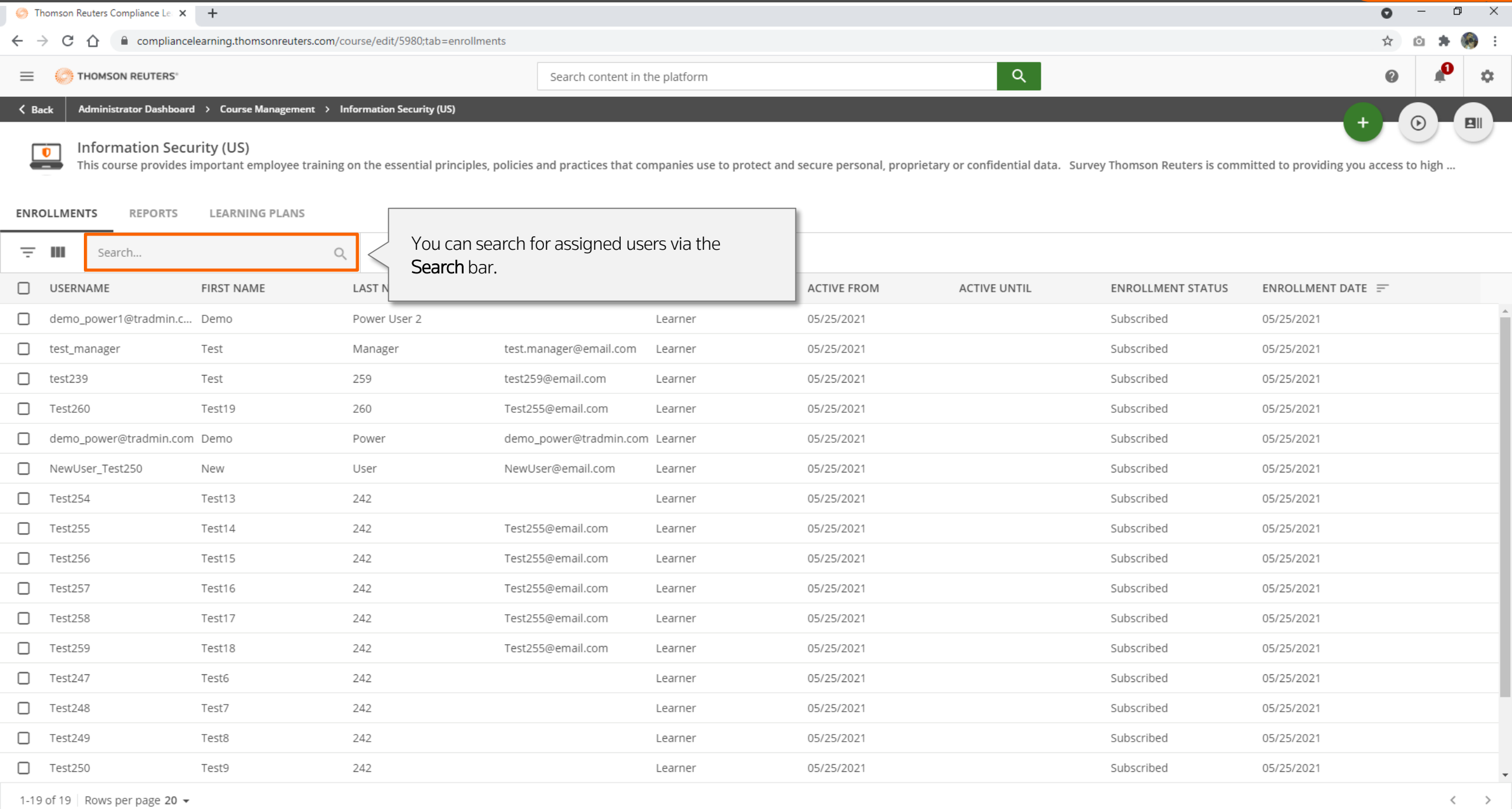
Course Management
Manage course details and properties
Search within results...
Thomson R... > 00. TR Com... >
CODE
THUMBNAIL
NAME
TYPE
CREATION DATE
SESSIONS
SESSION WAITING LIST
19 Enrolled Users
00294_WC_...
Information Security (US)
E-Learning
19
00514_TR_S...
Information Security and Cyber Risk Awareness (Global)
E-Learning
0
00192_TR_S...
Anti-Money Laundering (AML) (Global)
E-Learning
1
00403_TR_S...
Personal Data Protection Act (Singapore)
E-Learning
05/21/2018
21
You will see the leaners have successfully been enrolled to the course. To view these enrollments, click the highlighted icon.


Thomson Reuters Compliance Le
compliancelearning.thomsonreuters.com/course/edit/5980;tab=enrollments
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Information Security (US)
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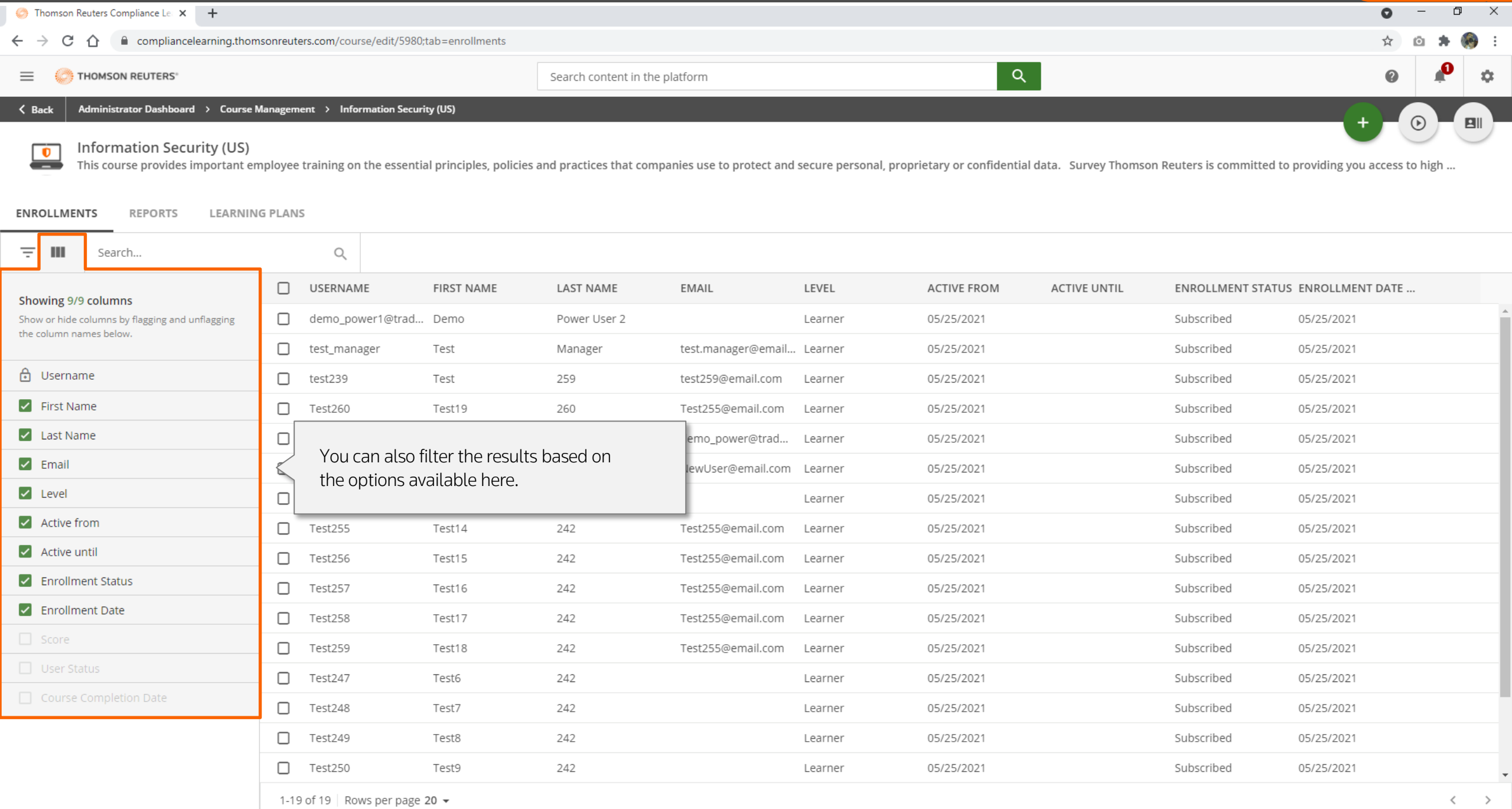
ENROLLMENTS
REPORTS
LEARNING PLANS
Search...
You can search for assigned users via the Search bar.
USERNAME
FIRST NAME
LAST N
ACTIVE FROM
ACTIVE UNTIL
ENROLLMENT STATUS
ENROLLMENT DATE
demo_power1@tradmin.c... Demo Power User 2 Learner 05/25/2021 Subscribed 05/25/2021
test_manager Test Manager test.manager@email.com Learner 05/25/2021 Subscribed 05/25/2021
test239 Test 259 test259@email.com Learner 05/25/2021 Subscribed 05/25/2021
Test260 Test19 260 Test255@email.com Learner 05/25/2021 Subscribed 05/25/2021
demo_power@tradmin.com Demo Power demo_power@tradmin.com Learner 05/25/2021 Subscribed 05/25/2021
NewUser_Test250 New User NewUser@email.com Learner 05/25/2021 Subscribed 05/25/2021
Test254 Test13 242 Learner 05/25/2021 Subscribed 05/25/2021
Test255 Test14 242 Test255@email.com Learner 05/25/2021 Subscribed 05/25/2021
Test256 Test15 242 Test255@email.com Learner 05/25/2021 Subscribed 05/25/2021
Test257 Test16 242 Test255@email.com Learner 05/25/2021 Subscribed 05/25/2021
Test258 Test17 242 Test255@email.com Learner 05/25/2021 Subscribed 05/25/2021
Test259 Test18 242 Test255@email.com Learner 05/25/2021 Subscribed 05/25/2021
Test247 Test6 242 Learner 05/25/2021 Subscribed 05/25/2021
Test248 Test7 242 Learner 05/25/2021 Subscribed 05/25/2021
Test249 Test8 242 Learner 05/25/2021 Subscribed 05/25/2021
Test250 Test9 242 Learner 05/25/2021 Subscribed 05/25/2021
1-19 of 19
Rows per page 20

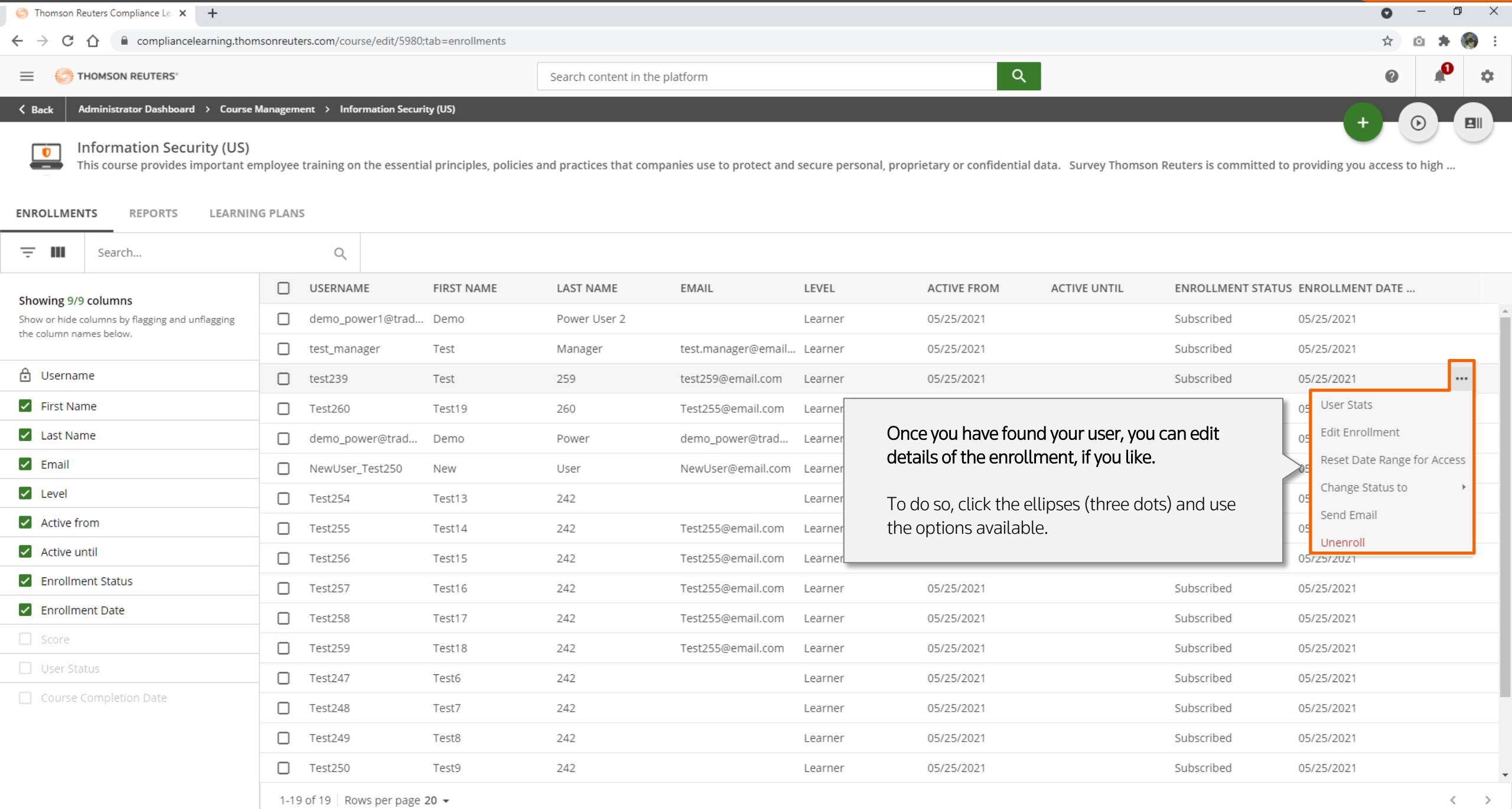
Editing User Enrollment (2)

Return to Menu



Editing User Enrollment (3)

Return to Menu

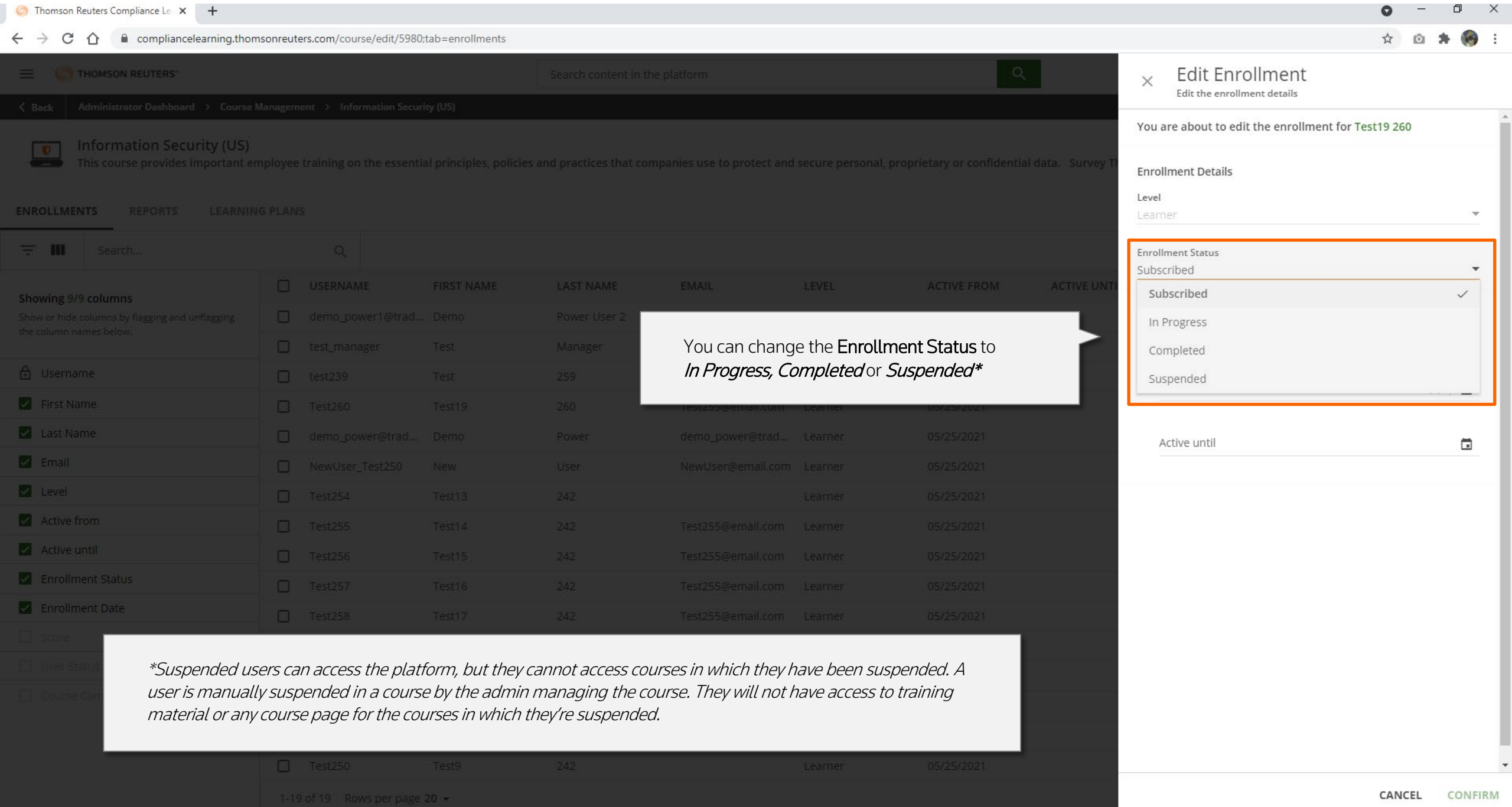


Once you have found your user, you can edit details of the enrollment, if you like.

To do so, click the ellipses (three dots) and use the options available.

Editing User Enrollment (4)

Return to Menu

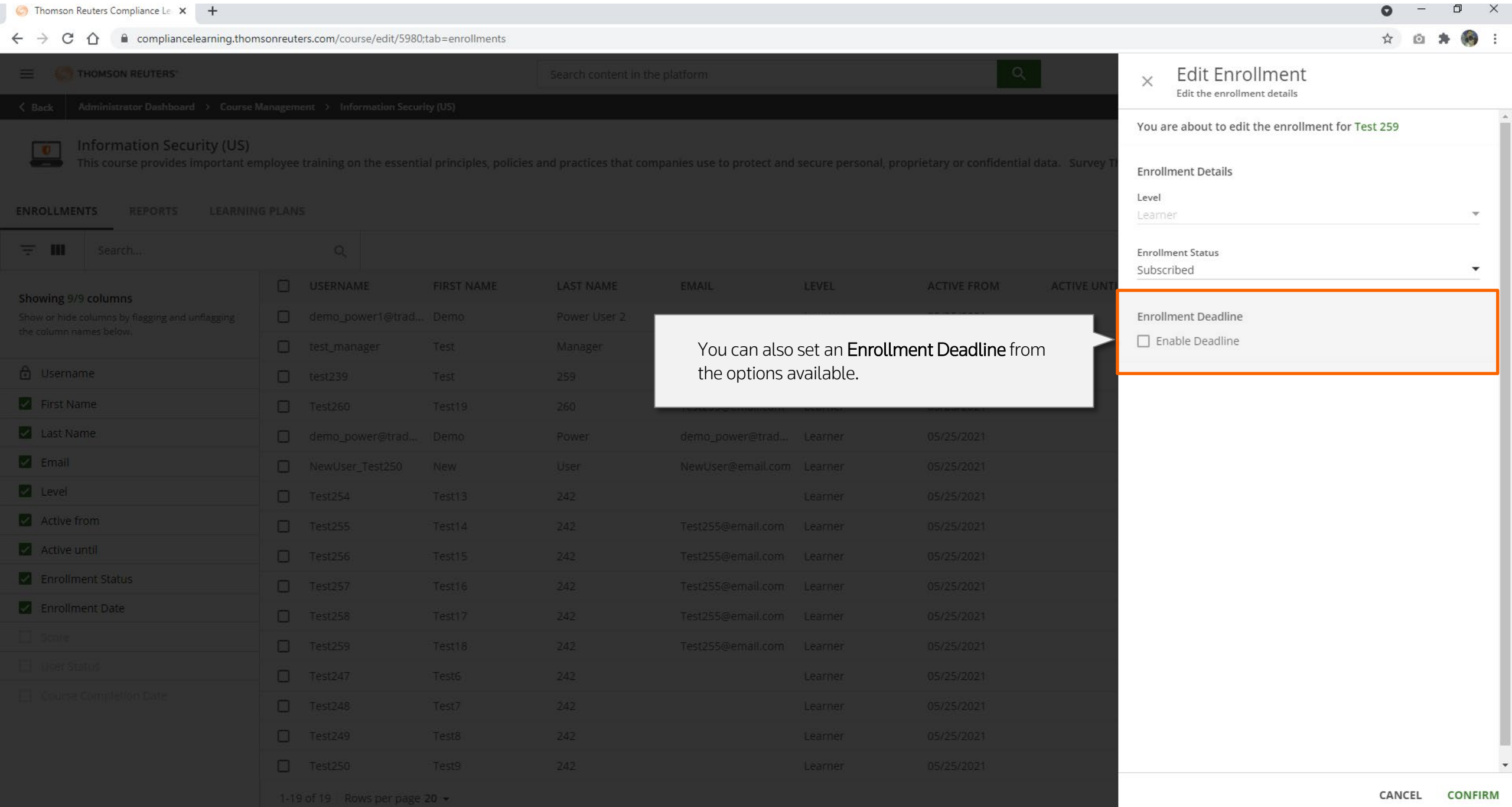


You can change the **Enrollment Status** to *In Progress, Completed* or *Suspended**

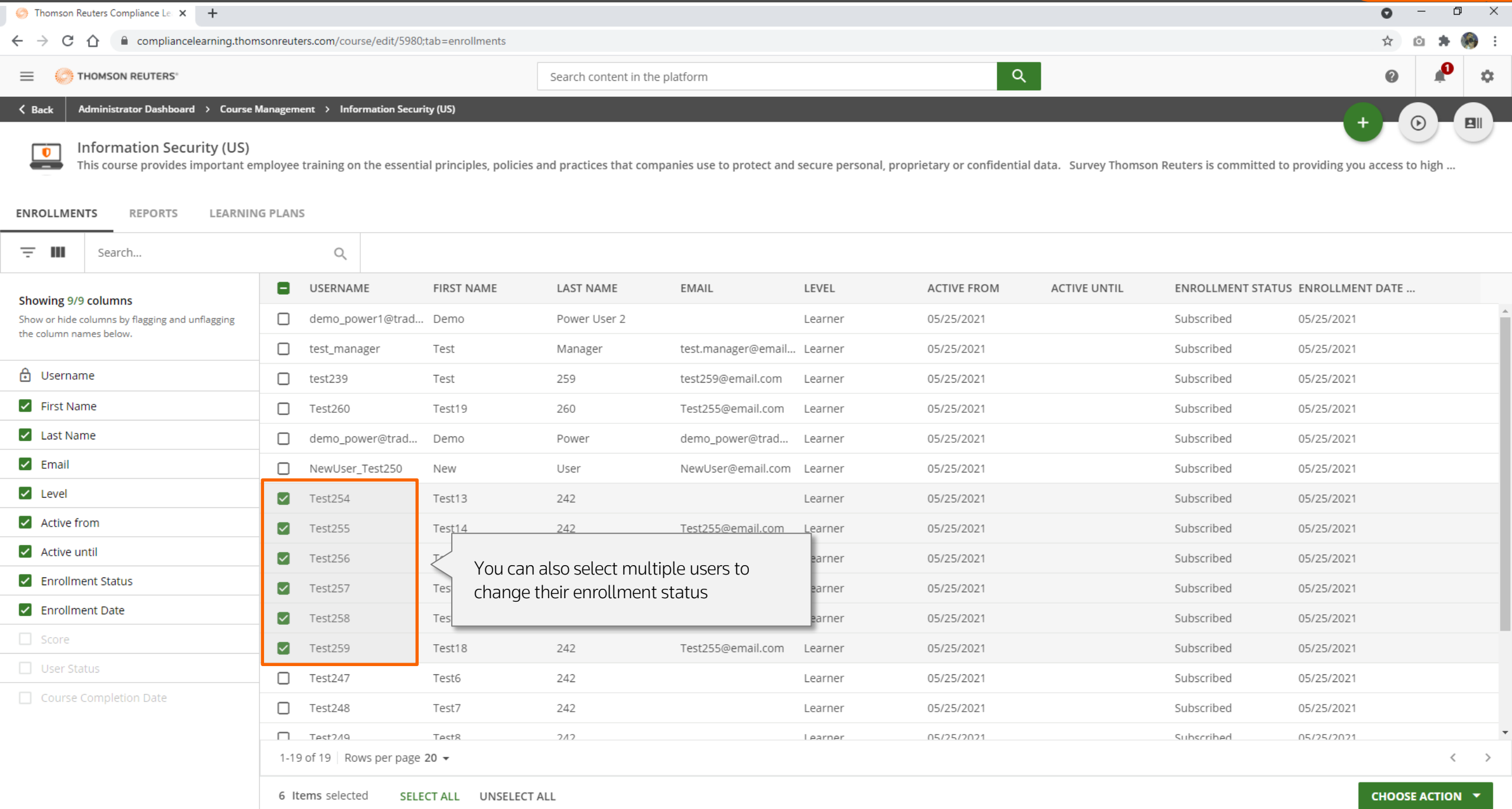
**Suspended users can access the platform, but they cannot access courses in which they have been suspended. A user is manually suspended in a course by the admin managing the course. They will not have access to training material or any course page for the courses in which they're suspended.*

Editing User Enrollment (5)

Return to Menu



You can also set an **Enrollment Deadline** from the options available.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Information Security (US)
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Show or hide columns by flagging and unflagging the column names below.
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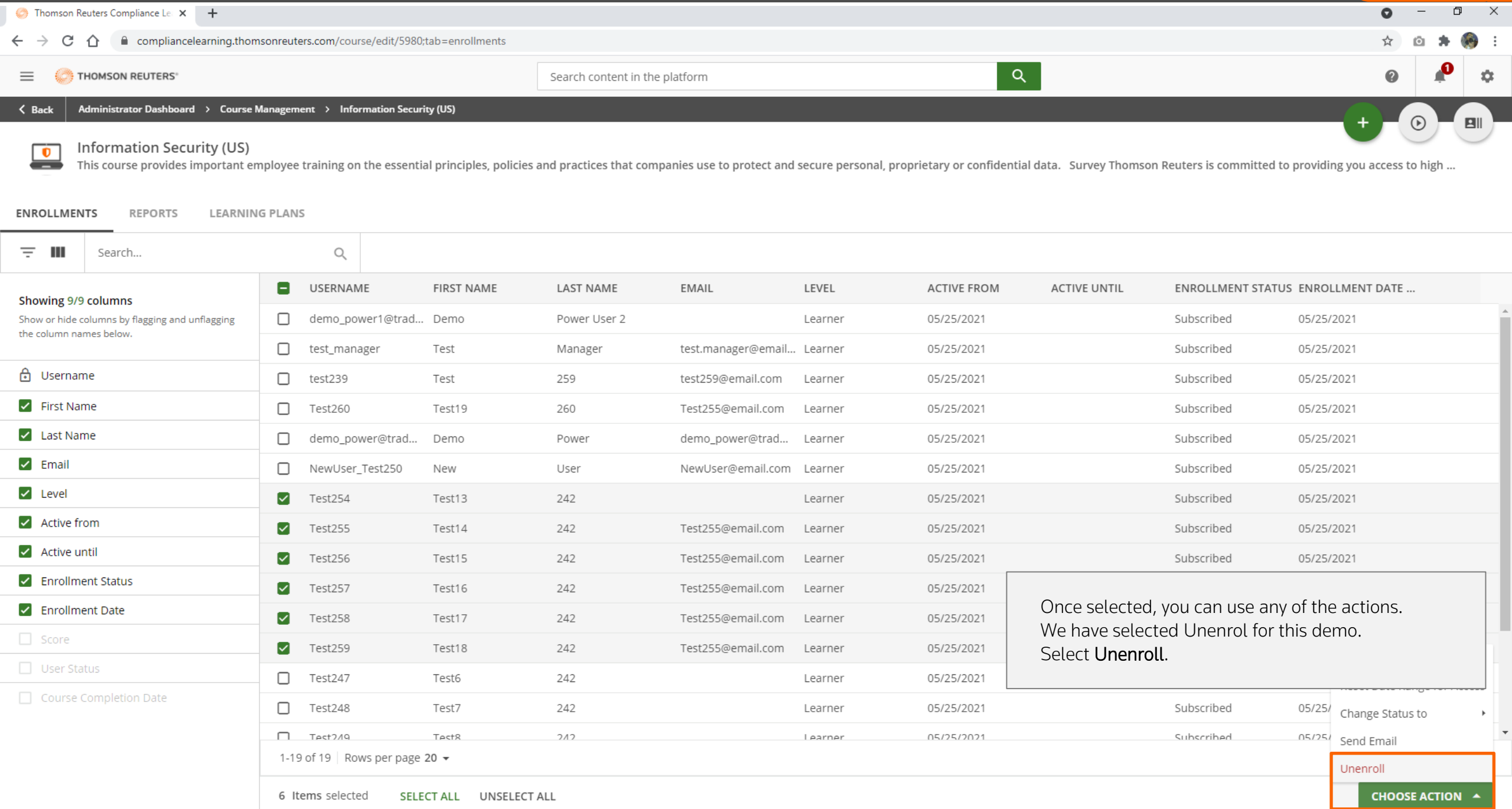
Last Name
Email
Level
Active from
Active until
Enrollment Status
Enrollment Date
Score
User Status
Course Completion Date
USERNAME
FIRST NAME
LAST NAME
EMAIL
LEVEL
ACTIVE FROM
ACTIVE UNTIL
ENROLLMENT STATUS
ENROLLMENT DATE ...
demo_power1@trad... Demo Power User 2 Learner 05/25/2021 Subscribed 05/25/2021
test_manager Test Manager test.manager@email... Learner 05/25/2021 Subscribed 05/25/2021
test239 Test 259 test259@email.com Learner 05/25/2021 Subscribed 05/25/2021
Test260 Test19 260 Test255@email.com Learner 05/25/2021 Subscribed 05/25/2021
demo_power@trad... Demo Power demo_power@trad... Learner 05/25/2021 Subscribed 05/25/2021
NewUser_Test250 New User NewUser@email.com Learner 05/25/2021 Subscribed 05/25/2021
Test254 Test13 242 Learner 05/25/2021 Subscribed 05/25/2021
Test255 Test14 242 Test255@email.com Learner 05/25/2021 Subscribed 05/25/2021
Test256 Learner 05/25/2021 Subscribed 05/25/2021
Test257 Learner 05/25/2021 Subscribed 05/25/2021
Test258 Learner 05/25/2021 Subscribed 05/25/2021
Test259 Test18 242 Test255@email.com Learner 05/25/2021 Subscribed 05/25/2021
Test247 Test6 242 Learner 05/25/2021 Subscribed 05/25/2021
Test248 Test7 242 Learner 05/25/2021 Subscribed 05/25/2021
You can also select multiple users to change their enrollment status
1-19 of 19
Rows per page 20
6 Items selected
SELECT ALL
UNSELECT ALL
CHOOSE ACTION


Thomson Reuters Compliance Le
compliancelearning.thomsonreuters.com/course/edit/5980;tab=enrollments
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Course Management
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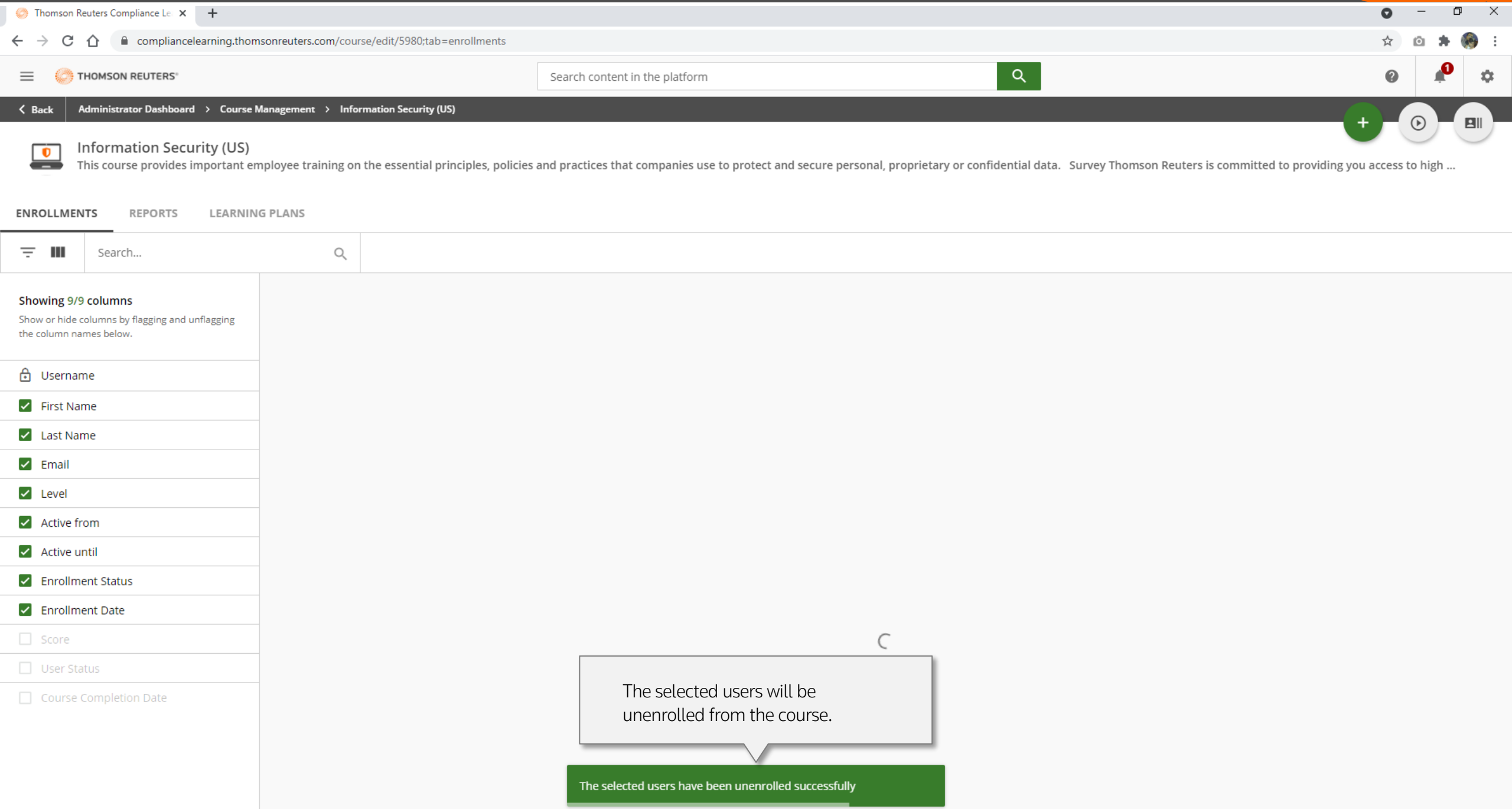
REPORTS
LEARNING PLANS
Search...
Showing 9/9 columns
Show or hide columns by flagging and unflagging the column names below.
Username
First Name
Last Name
Email
Level
Active from
Active until
Enrollment Status
Enrollment Date
Score
User Status
Course Completion Date
USERNAME
FIRST NAME
LAST NAME
EMAIL
LEVEL
ACTIVE FROM
ACTIVE UNTIL
ENROLLMENT STATUS
ENROLLMENT DATE ...
demo_power1@trad... Demo Power User 2 Learner 05/25/2021 Subscribed 05/25/2021
test_manager Test Manager test.manager@email... Learner 05/25/2021 Subscribed 05/25/2021
test239 Test 259 test259@email.com Learner 05/25/2021 Subscribed 05/25/2021
Test260 Test19 260 Test255@email.com Learner 05/25/2021 Subscribed 05/25/2021
demo_power@trad... Demo Power demo_power@trad... Learner 05/25/2021 Subscribed 05/25/2021
NewUser_Test250 New User NewUser@email.com Learner 05/25/2021 Subscribed 05/25/2021
Test254 Test13 242 Learner 05/25/2021 Subscribed 05/25/2021
Test255 Test14 242 Test255@email.com Learner 05/25/2021 Subscribed 05/25/2021
Test256 Test15 242 Test255@email.com Learner 05/25/2021 Subscribed 05/25/2021
Test257 Test16 242 Test255@email.com Learner 05/25/2021
Test258 Test17 242 Test255@email.com Learner 05/25/2021
Test259 Test18 242 Test255@email.com Learner 05/25/2021
Test247 Test6 242 Learner 05/25/2021
Test248 Test7 242 Learner 05/25/2021 Subscribed
Once selected, you can use any of the actions.
We have selected Unenrol for this demo.
Select Unenroll.
Change Status to
Send Email
Unenroll
CHOOSE ACTION
1-19 of 19
Rows per page 20
6 Items selected
SELECT ALL
UNSELECT ALL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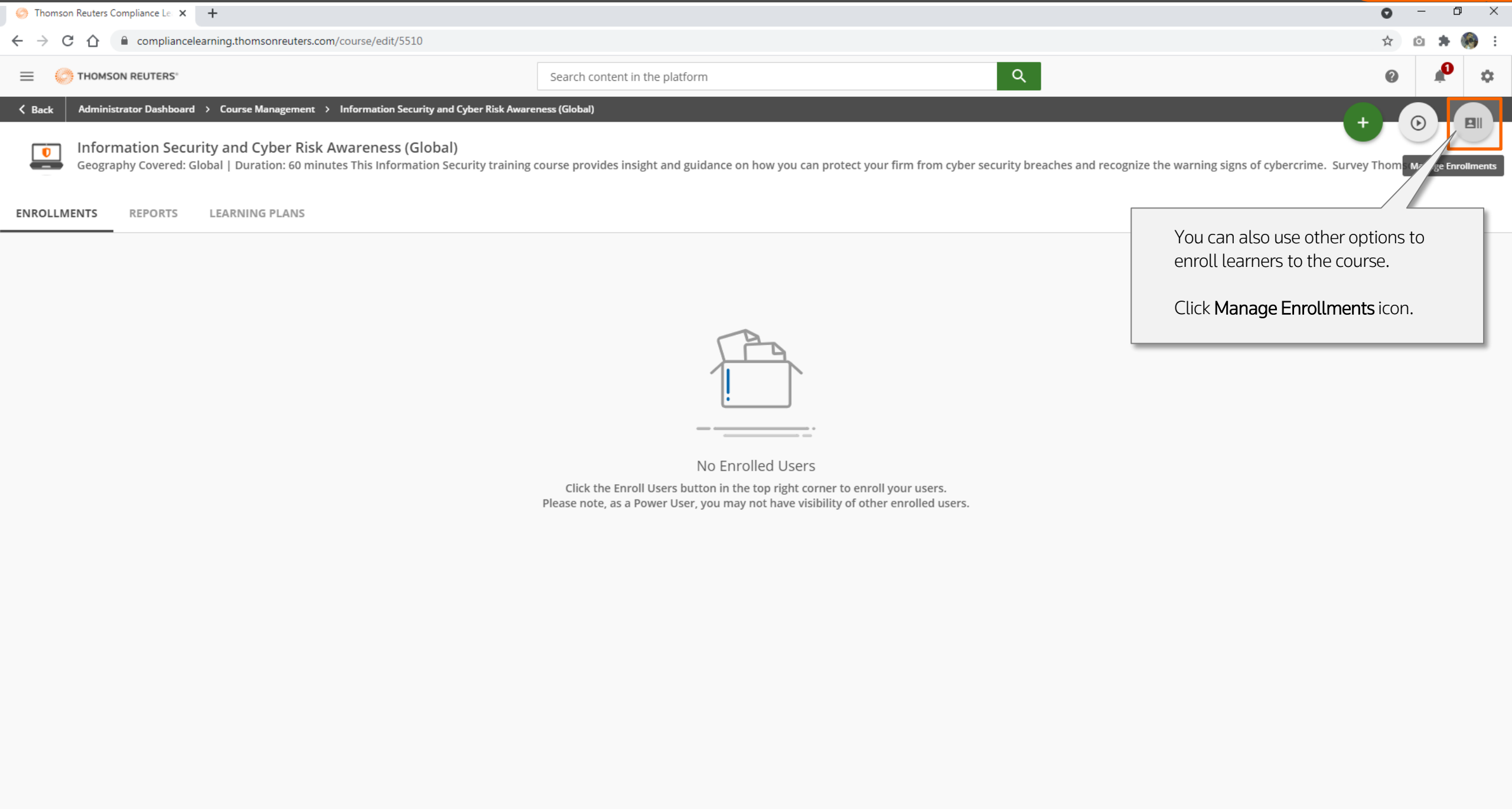
THOMSON REUTERS
Search content in the platform
Back
Administrator Dashboard
Course Management
Information Security (US)
Information Security (US)
This course provides important employee training on the essential principles, policies and practices that companies use to protect and secure personal, proprietary or confidential data. Survey Thomson Reuters is committed to providing you access to high ...
ENROLLMENTS
REPORTS
LEARNING PLANS
Search...
Showing 9/9 columns
Show or hide columns by flagging and unflagging the column names below.
Username
First Name
Last Name
Email
Level
Active from
Active until
Enrollment Status
Enrollment Date
Score
User Status
Course Completion Date
The selected users will be unenrolled from the course.
The selected users have been unenrolled successfully

Enrolling Users via CSV (1)

Return to Menu

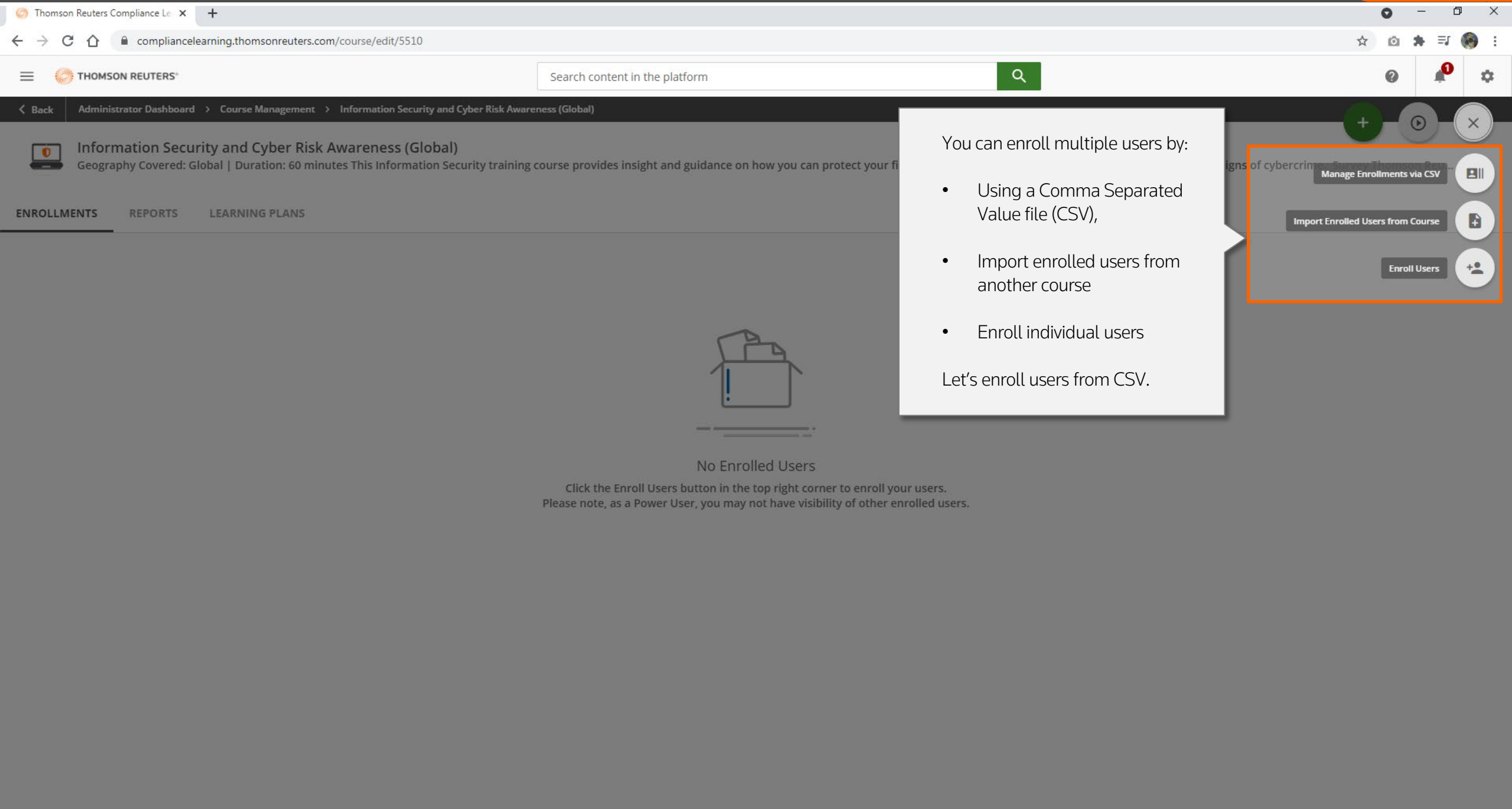


You can also use other options to enroll learners to the course.

Click **Manage Enrollments** icon.

Enrolling Users via CSV (2)

Return to Menu



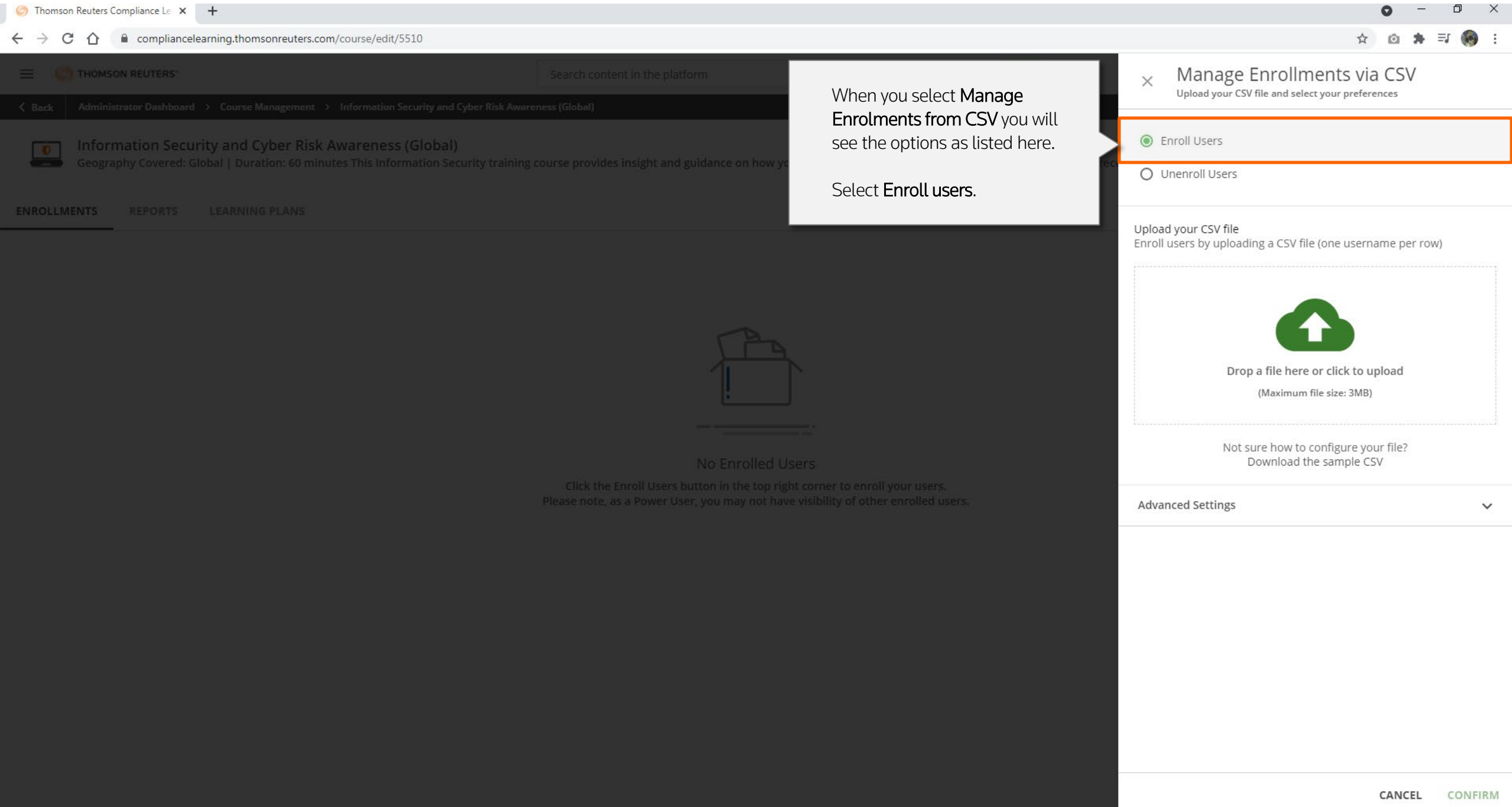
You can enroll multiple users by:

- Using a Comma Separated Value file (CSV),
- Import enrolled users from another course
- Enroll individual users

Let's enroll users from CSV.

Enrolling Users via CSV (3)

Return to Menu



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compliancelearning.thomsonreuters.com/course/edit/5510

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Search content in the platform

Back | Administrator Dashboard > Course Management > Information Security and Cyber Risk Aw

Information Security and Cyber Risk Awareness (Global)

Geography Covered: Global | Duration: 60 minutes This Information Security traini

otect your firm from cyber security breaches and rec

ENROLLMENTS REPORTS LEARNING PLANS

A sample CSV file is shown here. It is editable in Excel and has two columns. First Column is the username and second column is Level.

Note: Always keep the level as Learner.

Enroll User By C...

A22

	A	B	C
1	Username	Level	
2	Test242	Learner	
3	Test243	Learner	
4	Test244	Learner	
5	Test245	Learner	
6	Test246	Learner	
7	Test247	Learner	
8	Test248	Learner	
9	Test249	Learner	
10	Test250	Learner	
11	Test251	Learner	
12	Test252	Learner	
13	Test253	Learner	
14	Test254	Learner	
15	Test255	Learner	
16	Test256	Learner	
17	Test257	Learner	
18	Test258	Learner	
19	Test259	Learner	
20	Test260	Learner	

to enroll your users.

y of other enrolled users.

Manage Enrollments via CSV

Upload your CSV file and select your preferences

- (•) Enroll Users
- ( ) Unenroll Users

Upload your CSV file

Enroll users by uploading a CSV file (one username per row)

Drop a file here or click to upload

(Maximum file size: 3MB)

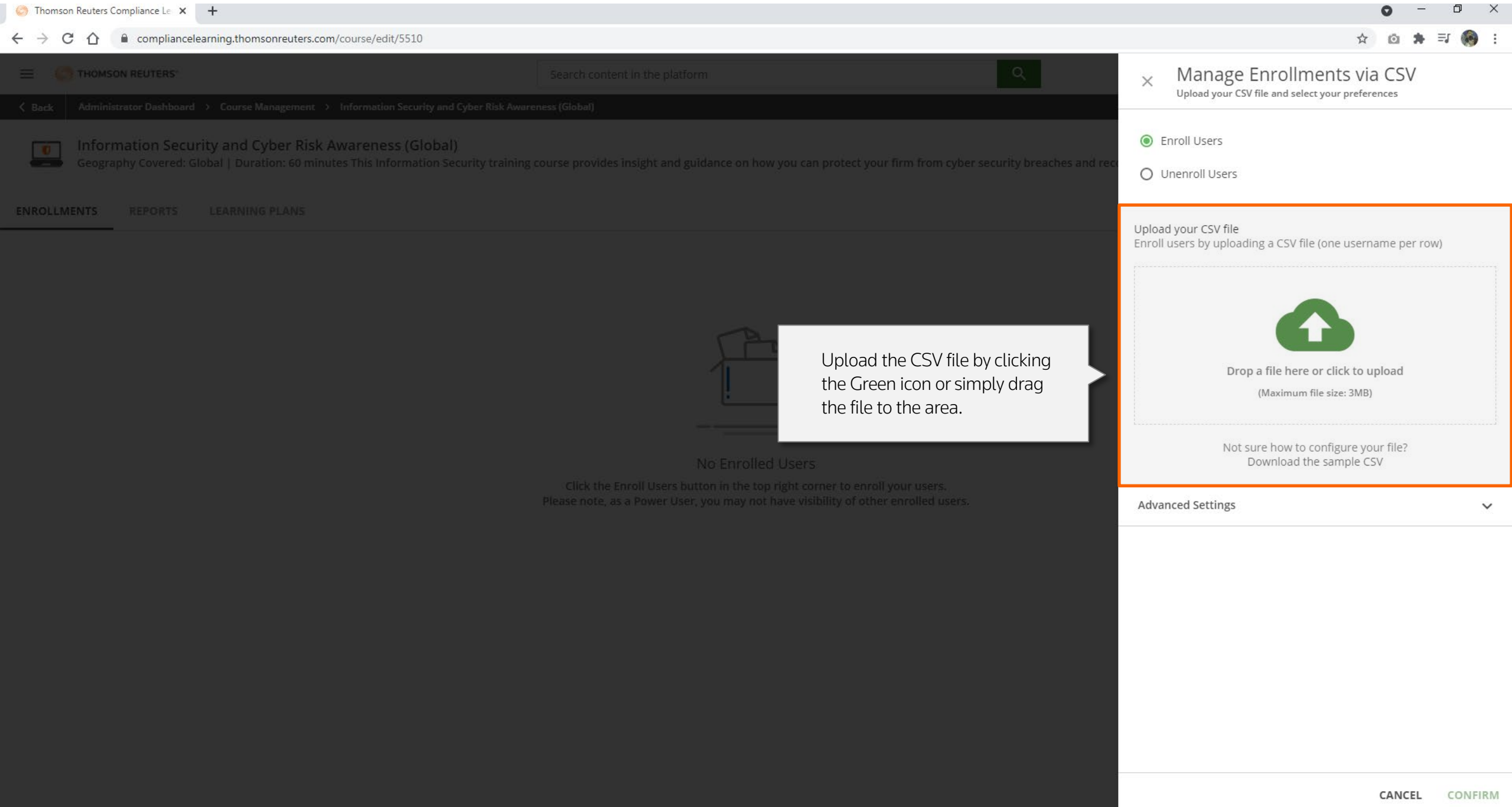
Not sure how to configure your file?
Download the sample CSV

Advanced Settings

CANCEL CONFIRM

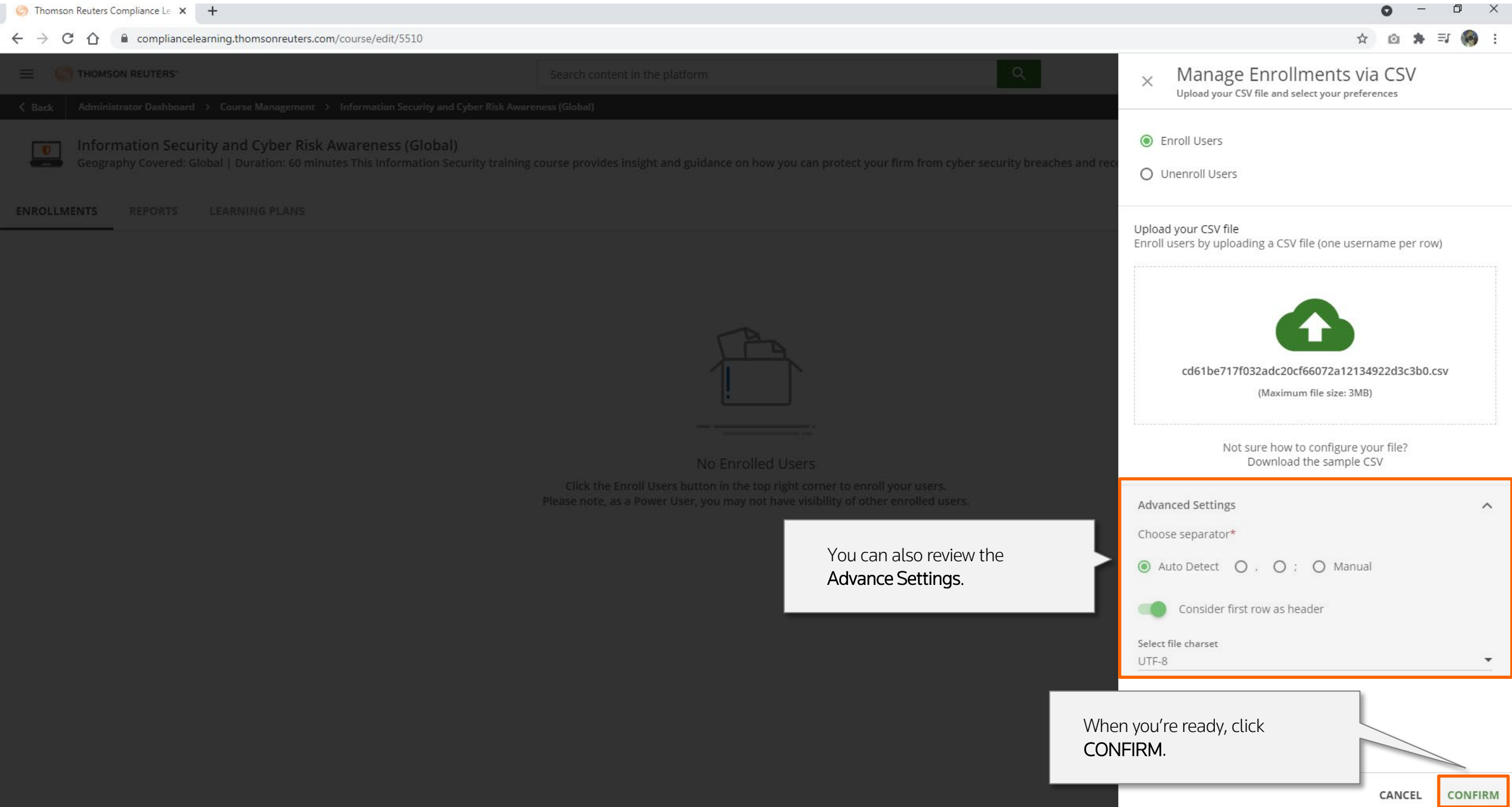
Enrolling Users via CSV (5)

Return to Menu



Enrolling Users via CSV (6)

Return to Menu

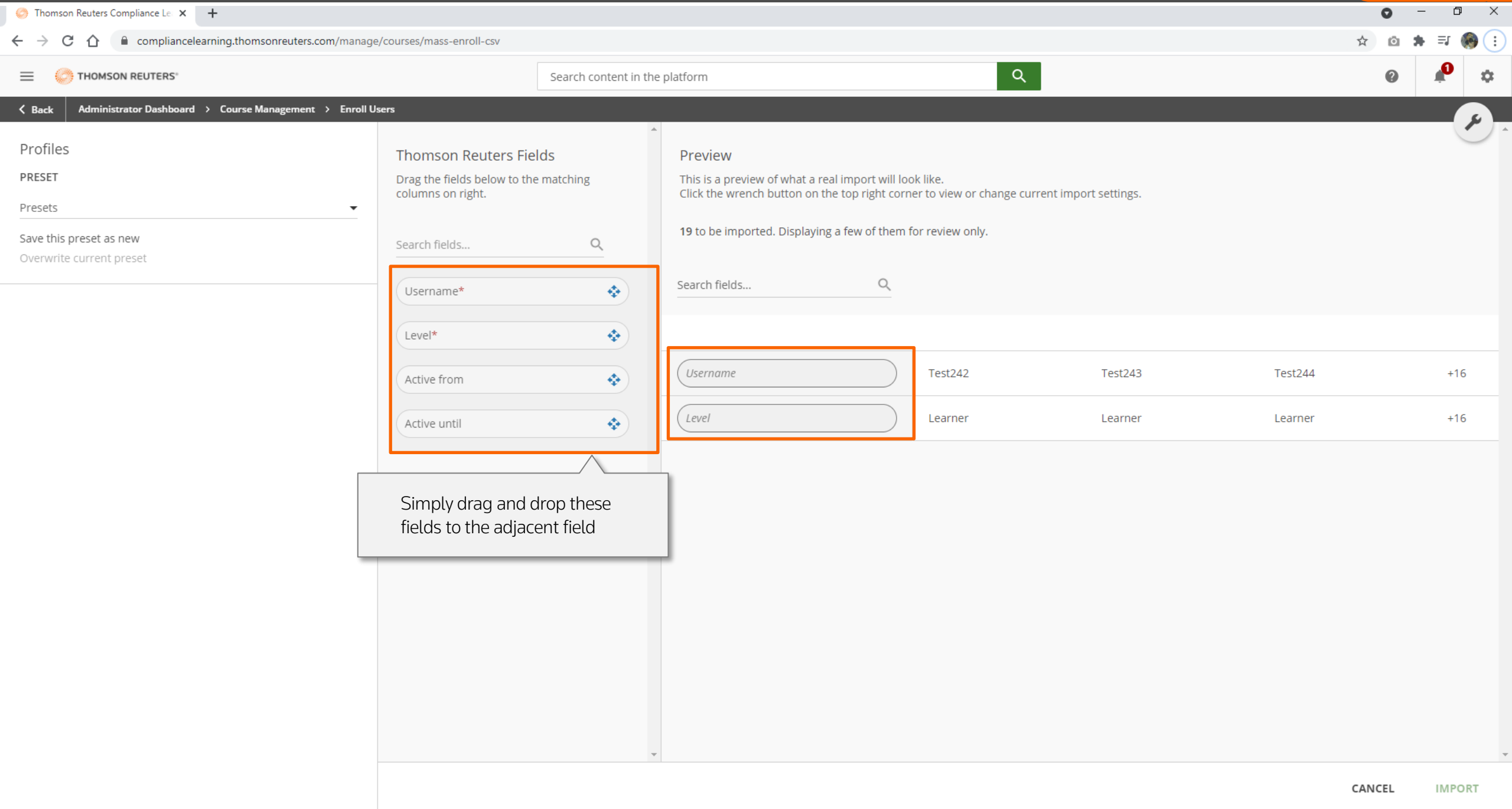


You can also review the **Advance Settings**.

When you're ready, click **CONFIRM**.

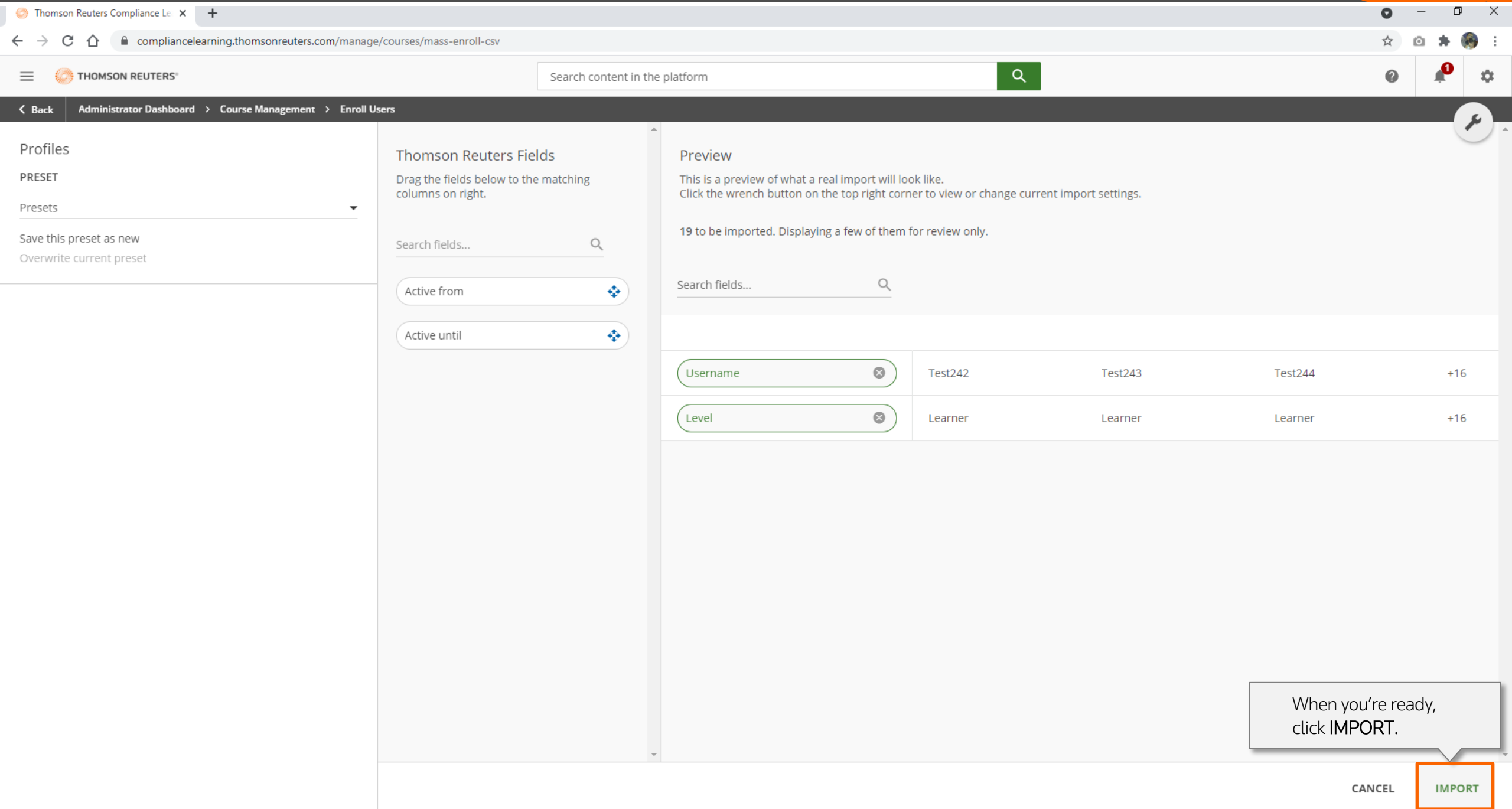
Enrolling Users via CSV (7)

Return to Menu



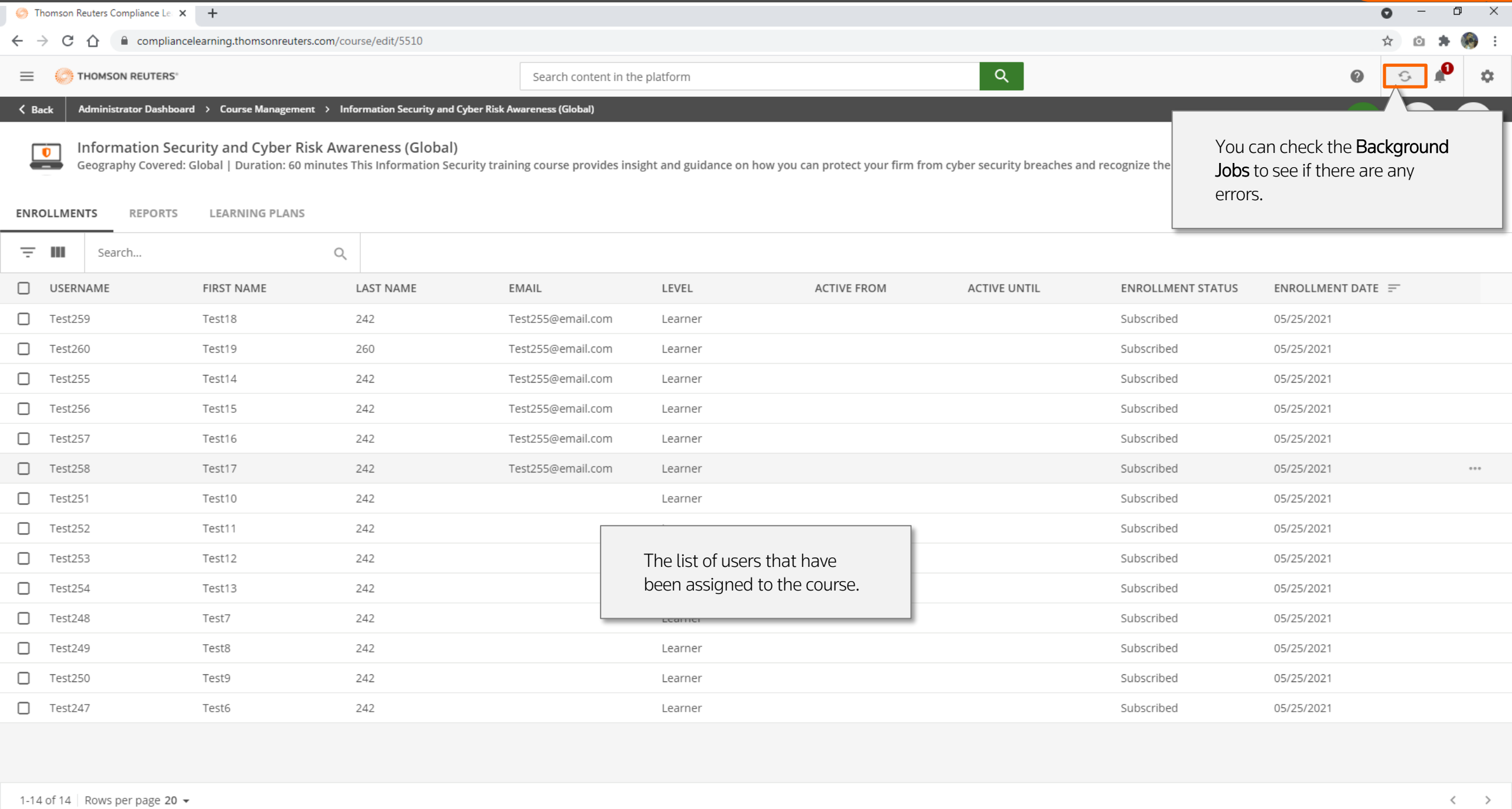
Enrolling Users via CSV (8)

Return to Menu



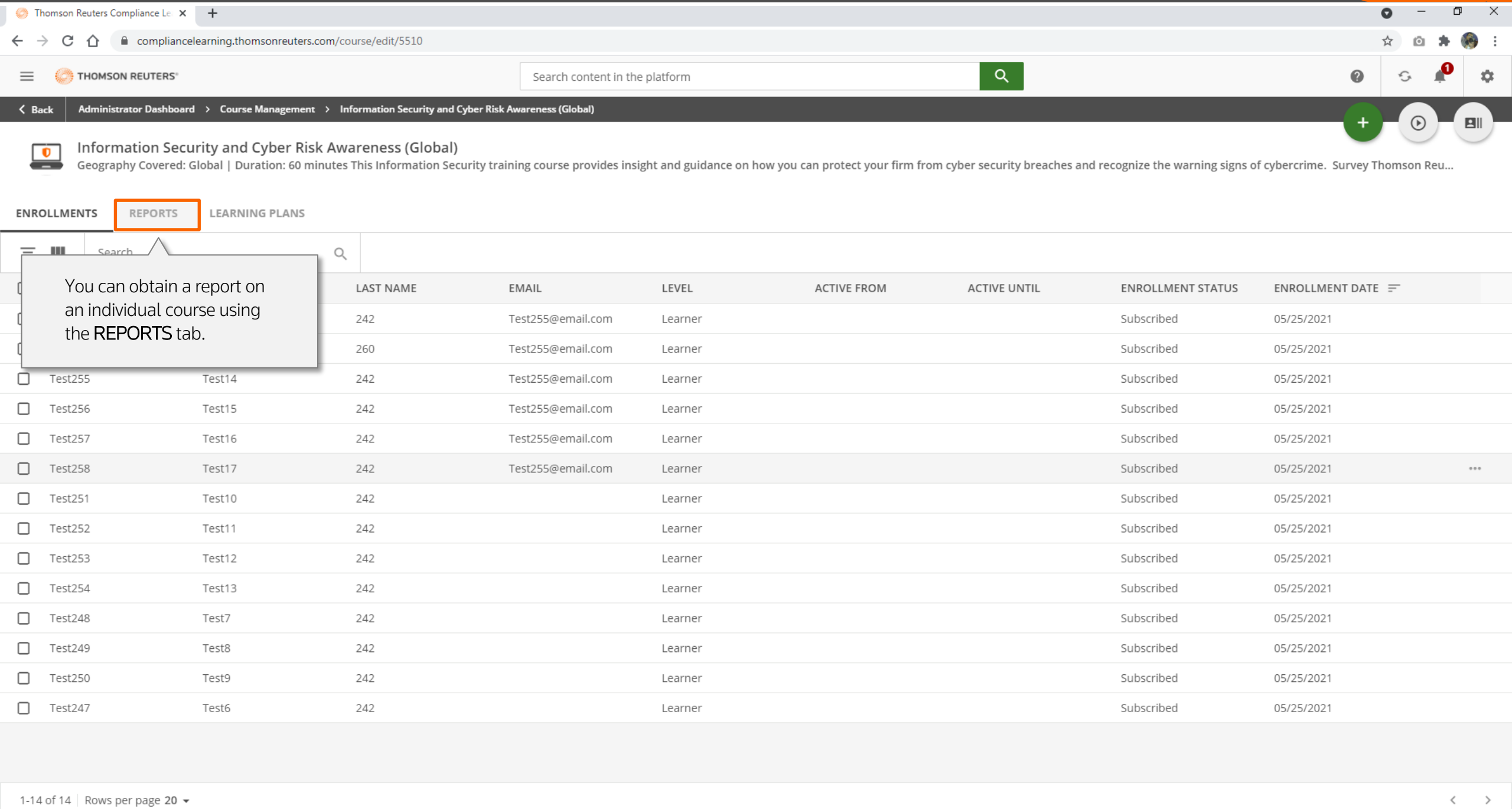
Enrolling Users via CSV (9)

Return to Menu



You can check the **Background Jobs** to see if there are any errors.

The list of users that have been assigned to the course.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Administrator Dashboard
Course Management
Information Security and Cyber Risk Awareness (Global)
Information Security and Cyber Risk Awareness (Global)
Geography Covered: Global | Duration: 60 minutes This Information Security training course provides insight and guidance on how you can protect your firm from cyber security breaches and recognize the warning signs of cybercrime. Survey Thomson Reu...
ENROLLMENTS
REPORTS
LEARNING PLANS
Search
You can obtain a report on an individual course using the REPORTS tab.
LAST NAME
EMAIL
LEVEL
ACTIVE FROM
ACTIVE UNTIL
ENROLLMENT STATUS
ENROLLMENT DATE
242 Test255@email.com Learner Subscribed 05/25/2021
260 Test255@email.com Learner Subscribed 05/25/2021
Test255 Test14 242 Test255@email.com Learner Subscribed 05/25/2021
Test256 Test15 242 Test255@email.com Learner Subscribed 05/25/2021
Test257 Test16 242 Test255@email.com Learner Subscribed 05/25/2021
Test258 Test17 242 Test255@email.com Learner Subscribed 05/25/2021
Test251 Test10 242 Learner Subscribed 05/25/2021
Test252 Test11 242 Learner Subscribed 05/25/2021
Test253 Test12 242 Learner Subscribed 05/25/2021
Test254 Test13 242 Learner Subscribed 05/25/2021
Test248 Test7 242 Learner Subscribed 05/25/2021
Test249 Test8 242 Learner Subscribed 05/25/2021
Test250 Test9 242 Learner Subscribed 05/25/2021
Test247 Test6 242 Learner Subscribed 05/25/2021
1-14 of 14 Rows per page 20

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compliancelearning.thomsonreuters.com/course/edit/5510;tab=reports

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Search content in the platform

Administrator Dashboard > Course Management > Information Security and Cyber Risk Awareness (Global)

Information Security and Cyber Risk Awareness (Global)

Geography Covered: Global | Duration: 60 minutes This Information Security training course provides insight and guidance on how you can protect your firm from cyber security breaches and recognize the warning signs of cybercrime. Survey Thomson Reu...

ENROLLMENTS | REPORTS | LEARNING PLANS

Course report

Users that have completed the course: 0%

14 Enrolled Users

346 Days since launch

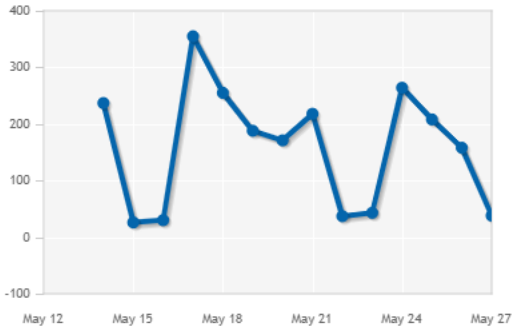
2 Training Material

13 To Begin

1 In Progress

0 Completed

Learning Object View Statistics:

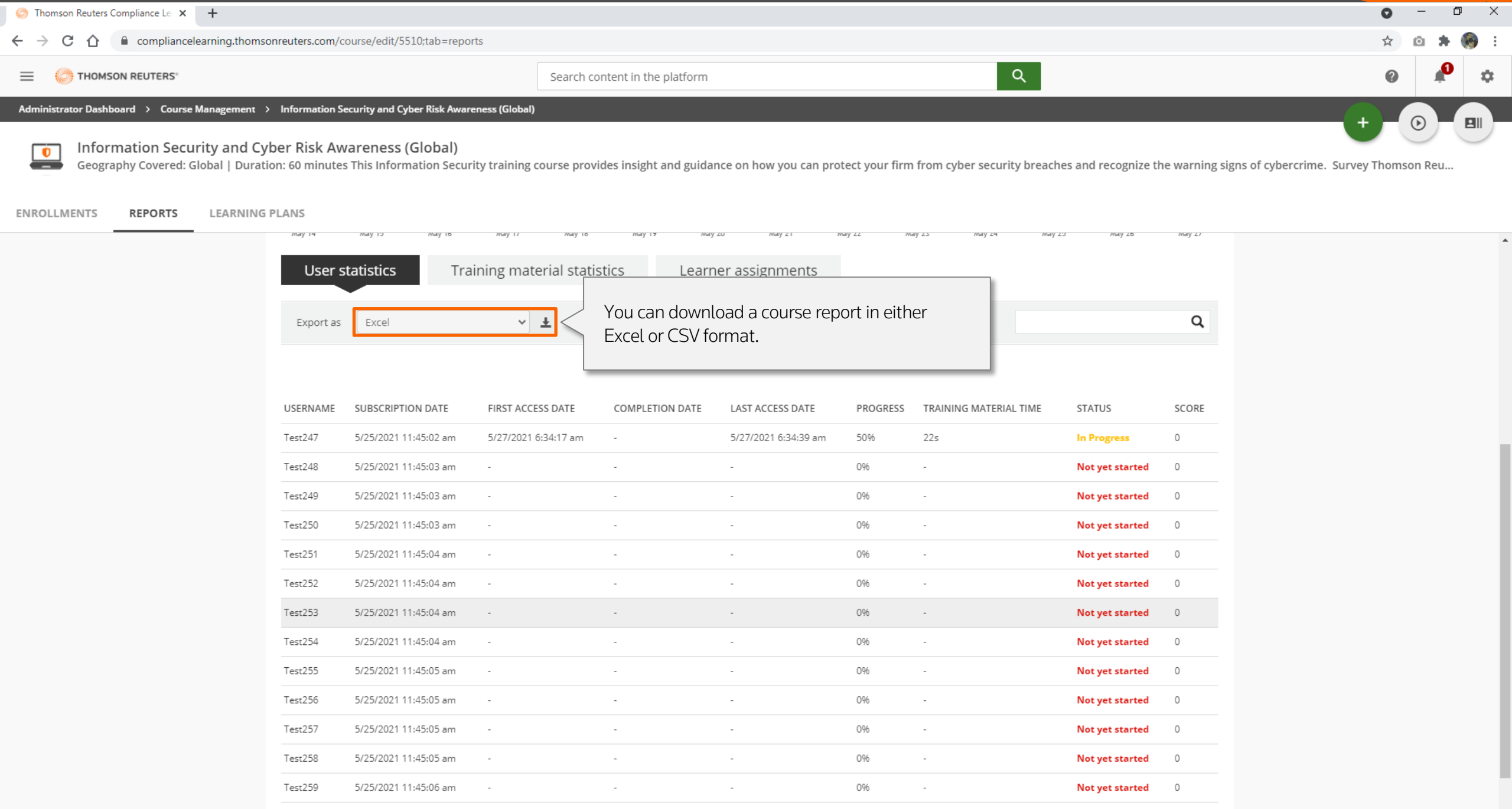


The top of this page displays the overall course statistics, and the bottom shows a list of individual users.

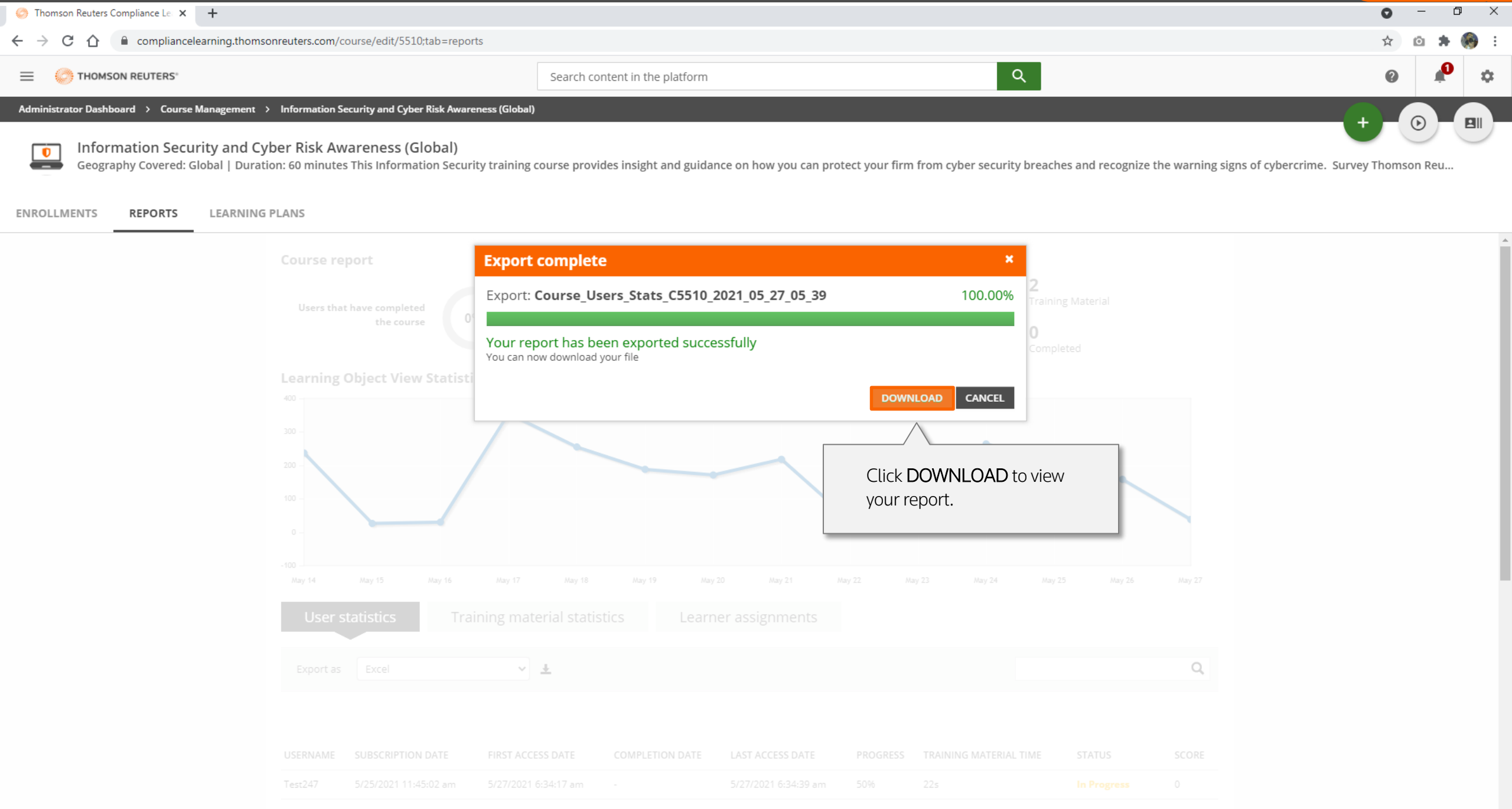
User statistics | Training material statistics | Learner assignments

Export as Excel

USERNAME	SUBSCRIPTION DATE	FIRST ACCESS DATE	COMPLETION DATE	LAST ACCESS DATE	PROGRESS	TRAINING MATERIAL TIME	STATUS	SCORE
Test247	5/25/2021 11:45:02 am	5/27/2021 6:34:17 am	-	5/27/2021 6:34:39 am	50%	22s	In Progress	0



USERNAME	SUBSCRIPTION DATE	FIRST ACCESS DATE	COMPLETION DATE	LAST ACCESS DATE	PROGRESS	TRAINING MATERIAL TIME	STATUS	SCORE
Test247	5/25/2021 11:45:02 am	5/27/2021 6:34:17 am	-	5/27/2021 6:34:39 am	50%	22s	In Progress	0
Test248	5/25/2021 11:45:03 am	-	-	-	0%	-	Not yet started	0
Test249	5/25/2021 11:45:03 am	-	-	-	0%	-	Not yet started	0
Test250	5/25/2021 11:45:03 am	-	-	-	0%	-	Not yet started	0
Test251	5/25/2021 11:45:04 am	-	-	-	0%	-	Not yet started	0
Test252	5/25/2021 11:45:04 am	-	-	-	0%	-	Not yet started	0
Test253	5/25/2021 11:45:04 am	-	-	-	0%	-	Not yet started	0
Test254	5/25/2021 11:45:04 am	-	-	-	0%	-	Not yet started	0
Test255	5/25/2021 11:45:05 am	-	-	-	0%	-	Not yet started	0
Test256	5/25/2021 11:45:05 am	-	-	-	0%	-	Not yet started	0
Test257	5/25/2021 11:45:05 am	-	-	-	0%	-	Not yet started	0
Test258	5/25/2021 11:45:05 am	-	-	-	0%	-	Not yet started	0
Test259	5/25/2021 11:45:06 am	-	-	-	0%	-	Not yet started	0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Administrator Dashboard > Course Management > Information Security and Cyber Risk Awareness (Global)
Information Security and Cyber Risk Awareness (Global)
Geography Covered: Global | Duration: 60 minutes This Information Security training course provides insight and guidance on how you can protect your firm from cyber security breaches and recognize the warning signs of cybercrime. Survey Thomson Reu...
ENROLLMENTS
REPORTS
LEARNING PLANS
Course report
Users that have completed the course
2
Training Material
0
Completed
Learning Object View Statisti
Export complete
Export: Course_Users_Stats_C5510_2021_05_27_05_39
100.00%
Your report has been exported successfully
You can now download your file
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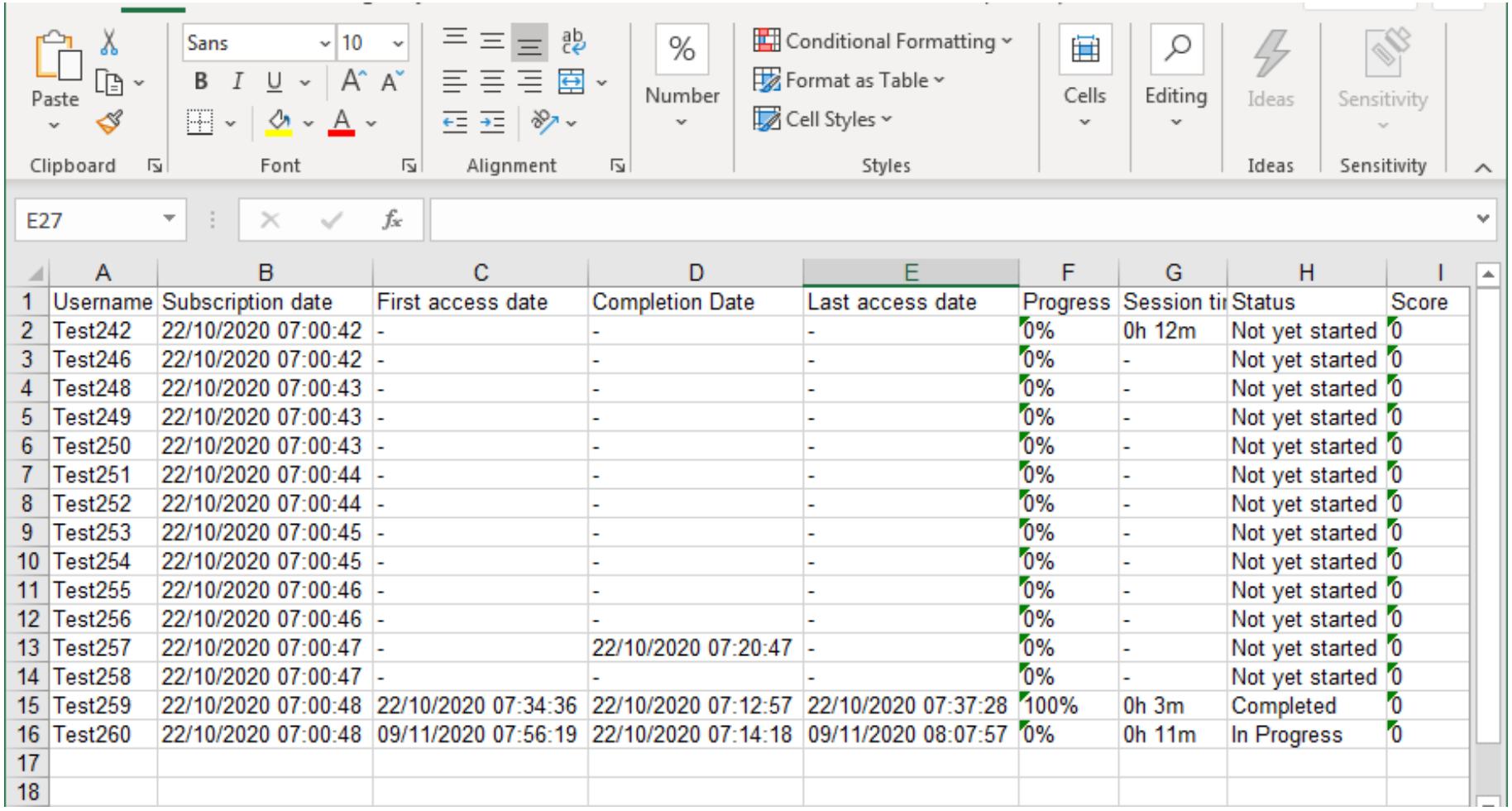
CANCEL
Click DOWNLOAD to view your report.
User statistics
Training material statistics
Learner assignments
Export as
Excel
USERNAME
SUBSCRIPTION DATE
FIRST ACCESS DATE
COMPLETION DATE
LAST ACCESS DATE
PROGRESS
TRAINING MATERIAL TIME
STATUS
SCORE
Test247
5/25/2021 11:45:02 am
5/27/2021 6:34:17 am
5/27/2021 6:34:39 am
50%
22s
In Progress
0

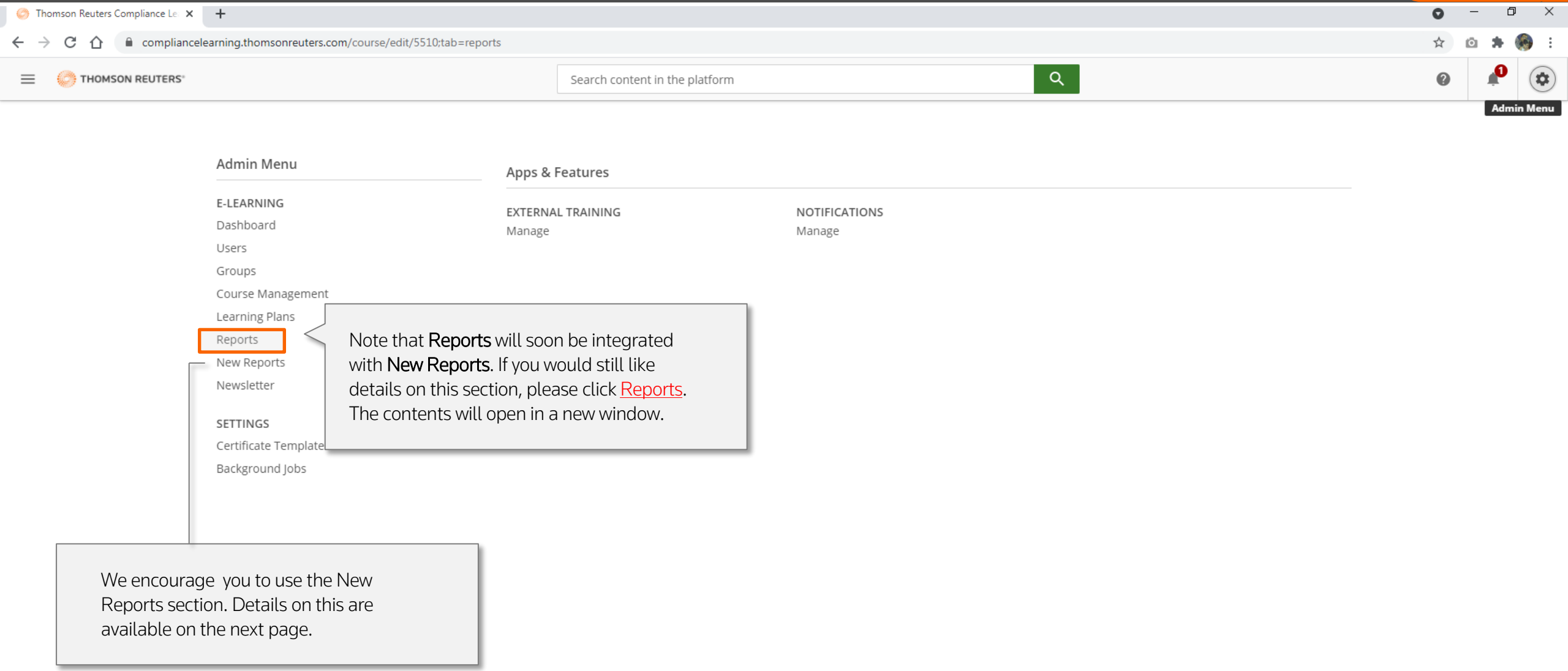


	A	B	C	D	E	F	G	H	I
1	Username	Subscription date	First access date	Completion Date	Last access date	Progress	Session ti	Status	Score
2	Test242	22/10/2020 07:00:42	-	-	-	0%	0h 12m	Not yet started	0
3	Test246	22/10/2020 07:00:42	-	-	-	0%	-	Not yet started	0
4	Test248	22/10/2020 07:00:43	-	-	-	0%	-	Not yet started	0
5	Test249	22/10/2020 07:00:43	-	-	-	0%	-	Not yet started	0
6	Test250	22/10/2020 07:00:43	-	-	-	0%	-	Not yet started	0
7	Test251	22/10/2020 07:00:44	-	-	-	0%	-	Not yet started	0
8	Test252	22/10/2020 07:00:44	-	-	-	0%	-	Not yet started	0
9	Test253	22/10/2020 07:00:45	-	-	-	0%	-	Not yet started	0
10	Test254	22/10/2020 07:00:45	-	-	-	0%	-	Not yet started	0
11	Test255	22/10/2020 07:00:46	-	-	-	0%	-	Not yet started	0
12	Test256	22/10/2020 07:00:46	-	-	-	0%	-	Not yet started	0
13	Test257	22/10/2020 07:00:47	-	22/10/2020 07:20:47	-	0%	-	Not yet started	0
14	Test258	22/10/2020 07:00:47	-	-	-	0%	-	Not yet started	0
15	Test259	22/10/2020 07:00:48	22/10/2020 07:34:36	22/10/2020 07:12:57	22/10/2020 07:37:28	100%	0h 3m	Completed	0
16	Test260	22/10/2020 07:00:48	09/11/2020 07:56:19	22/10/2020 07:14:18	09/11/2020 08:07:57	0%	0h 11m	In Progress	0
17									
18									

A **Sample Report** is shown here.

Return to Menu

Managing Reports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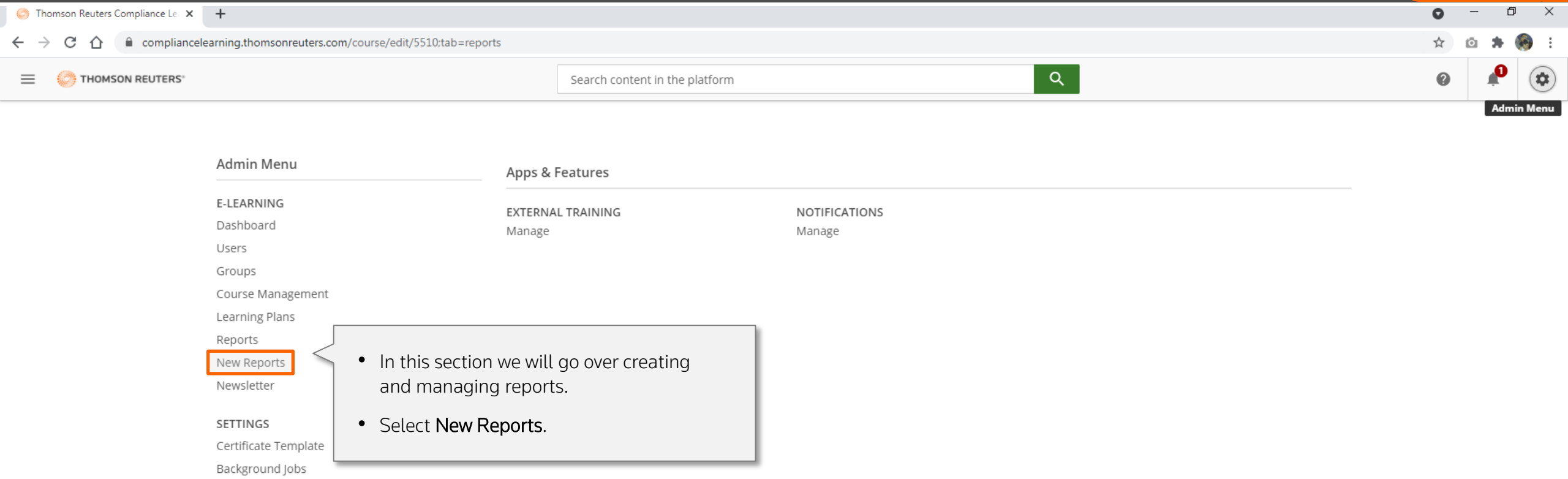
Groups
Course Management
Learning Plans
Reports
New Reports
Newsletter
SETTINGS
Certificate Template
Background Jobs
EXTERNAL TRAINING
Manage
NOTIFICATIONS
Manage
Note that Reports will soon be integrated with New Reports. If you would still like details on this section, please click Reports. The contents will open in a new window.
We encourage you to use the New Reports section. Details on this are available on the next page.

Return to Menu

Managing New Reports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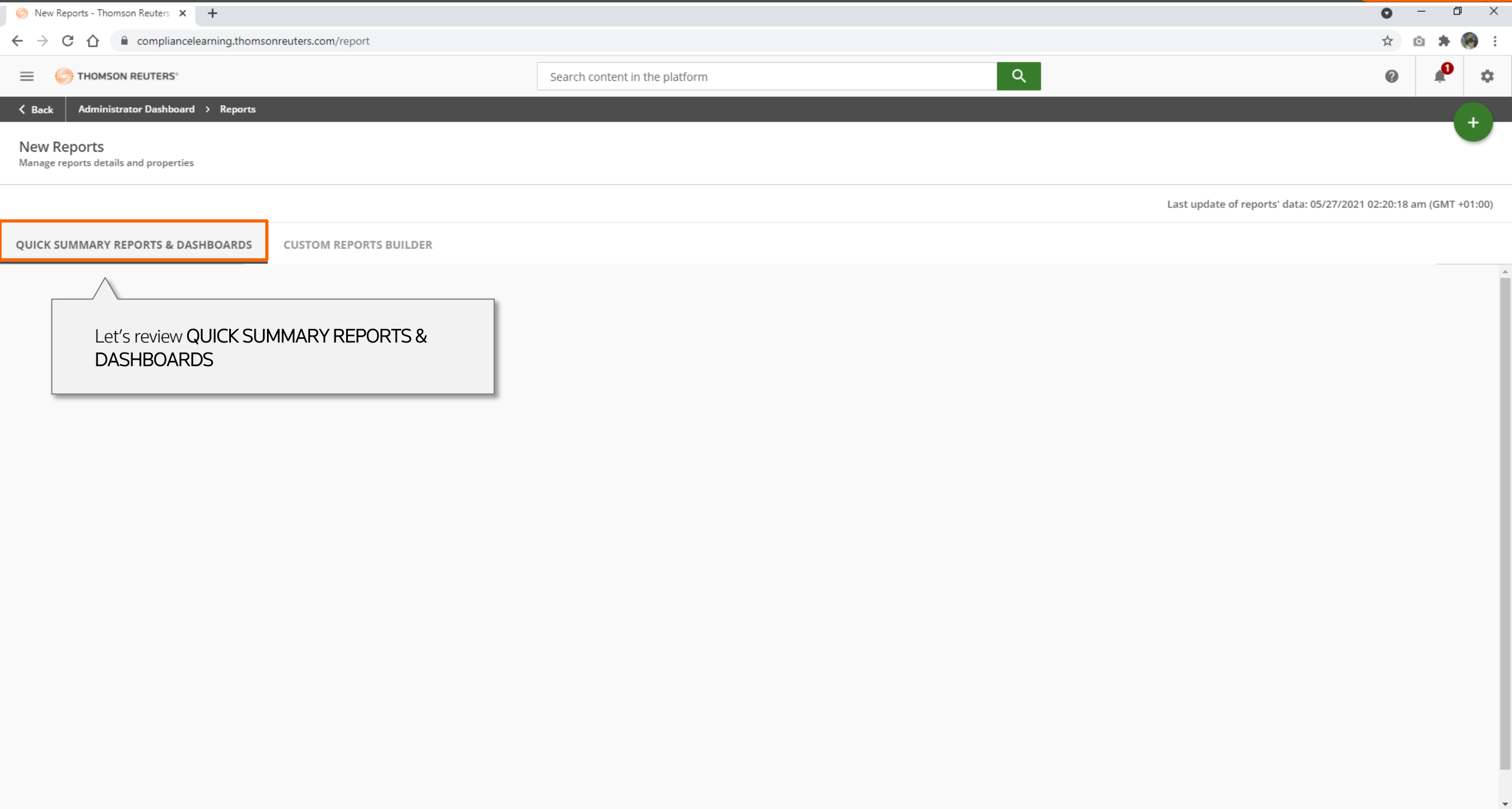
New Reports
Newsletter
SETTINGS
Certificate Template
Background Jobs
Apps & Features
EXTERNAL TRAINING
Manage
NOTIFICATIONS
Manage
In this section we will go over creating and managing reports.
Select New Reports.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compliancelearning.thomsonreuters.com/report
THOMSON REUTERS
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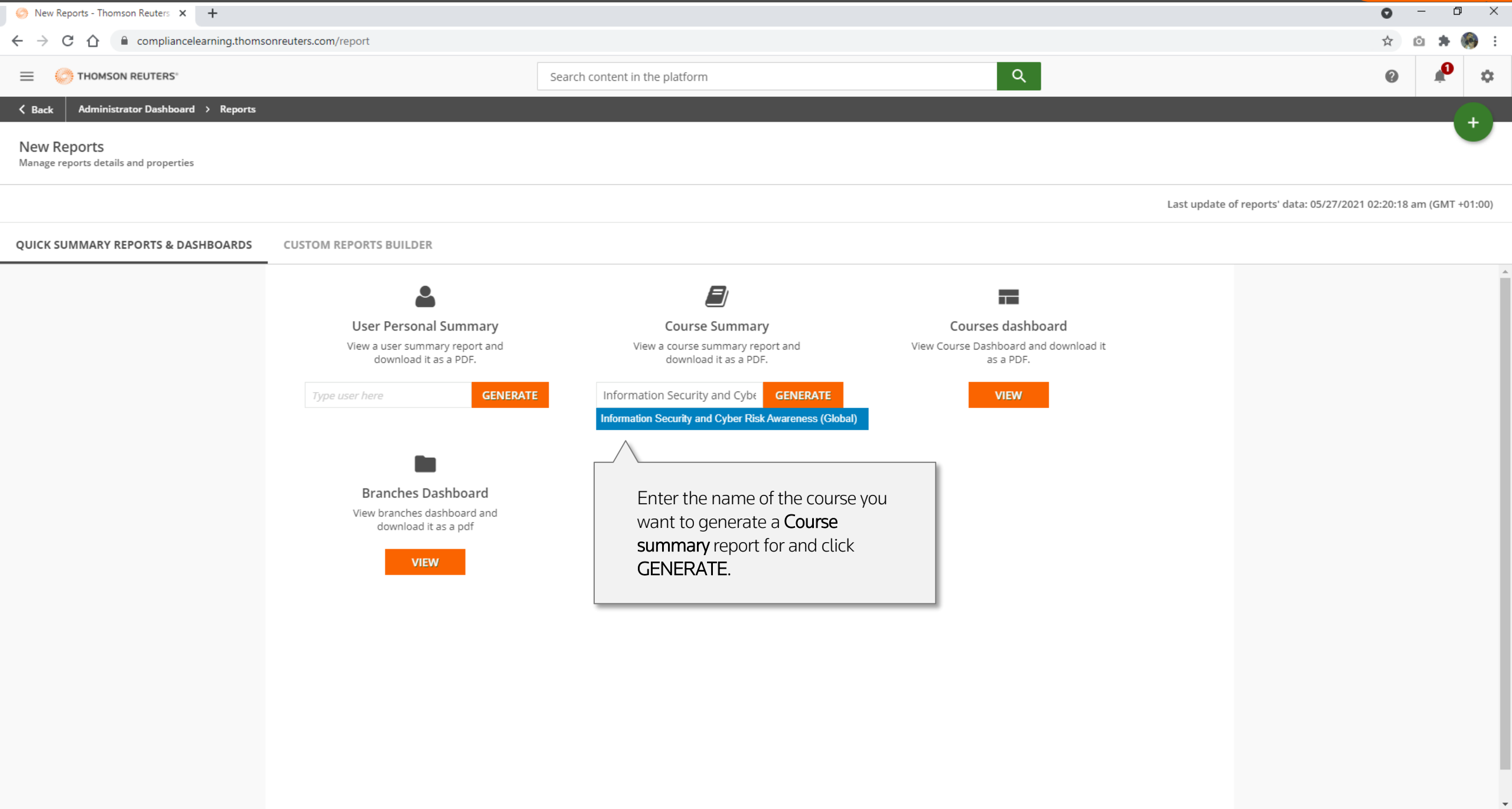
Back
Administrator Dashboard
Reports
New Reports
Manage reports details and properties
Last update of reports' data: 05/27/2021 02:20:18 am (GMT +01:00)
QUICK SUMMARY REPORTS & DASHBOARDS
CUSTOM REPORTS BUILDER
Let's review QUICK SUMMARY REPORTS & DASHBOARDS


New Reports - Thomson Reuters
compliancelearning.thomsonreuters.com/report
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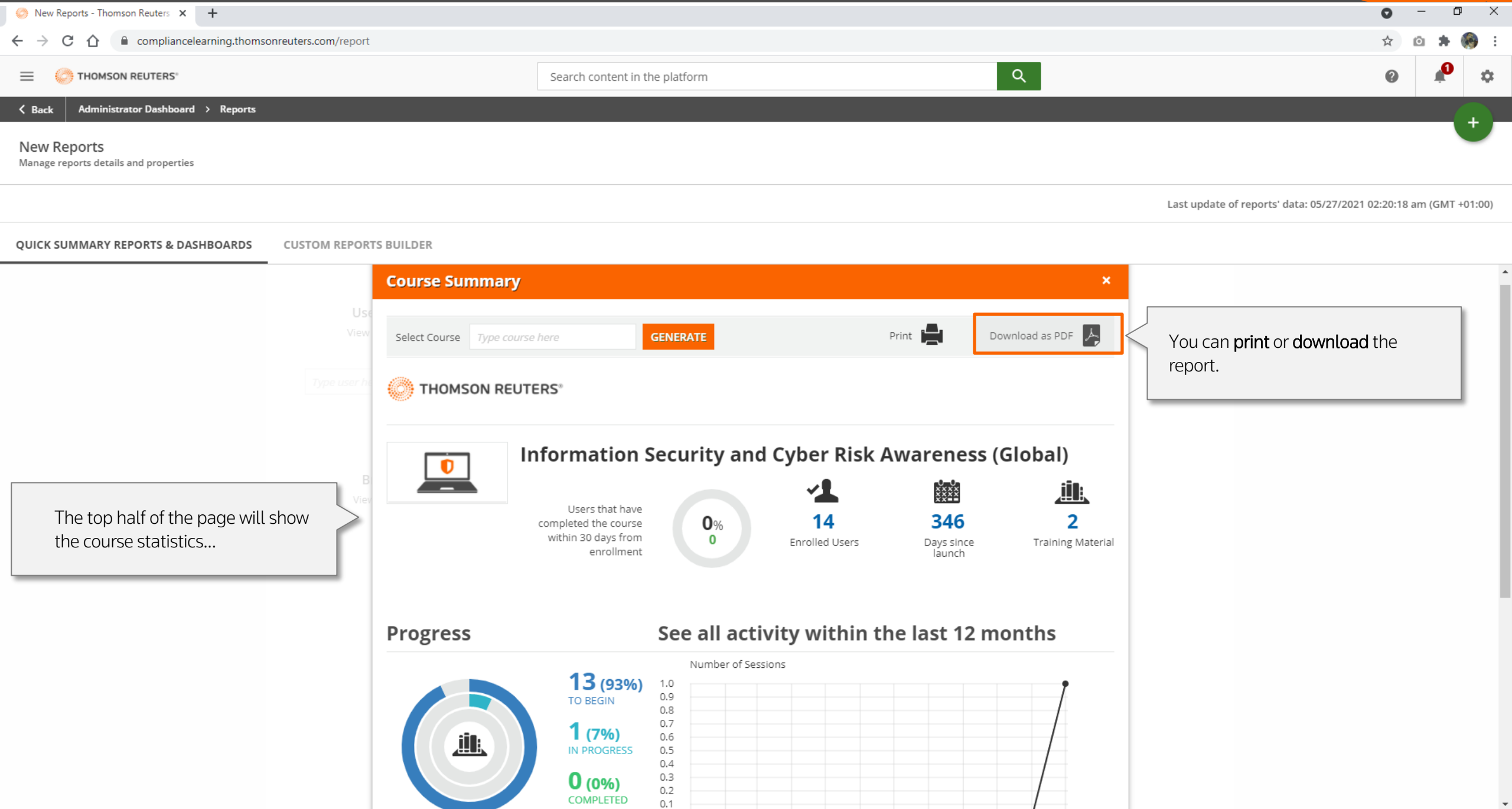
Back
Administrator Dashboard
Reports
New Reports
Manage reports details and properties
Last update of reports' data: 05/27/2021 02:20:18 am (GMT +01:00)
QUICK SUMMARY REPORTS & DASHBOARDS
CUSTOM REPORTS BUILDER
User Personal Summary
View a user summary report and download it as a PDF.
Type user here
GENERATE
Course Summary
View a course summary report and download it as a PDF.
Information Security and Cybe
GENERATE
Information Security and Cyber Risk Awareness (Global)
Courses dashboard
View Course Dashboard and download it as a PDF.
VIEW
Branches Dashboard
View branches dashboard and download it as a pdf
VIEW
Enter the name of the course you want to generate a Course summary report for and click GENERATE.

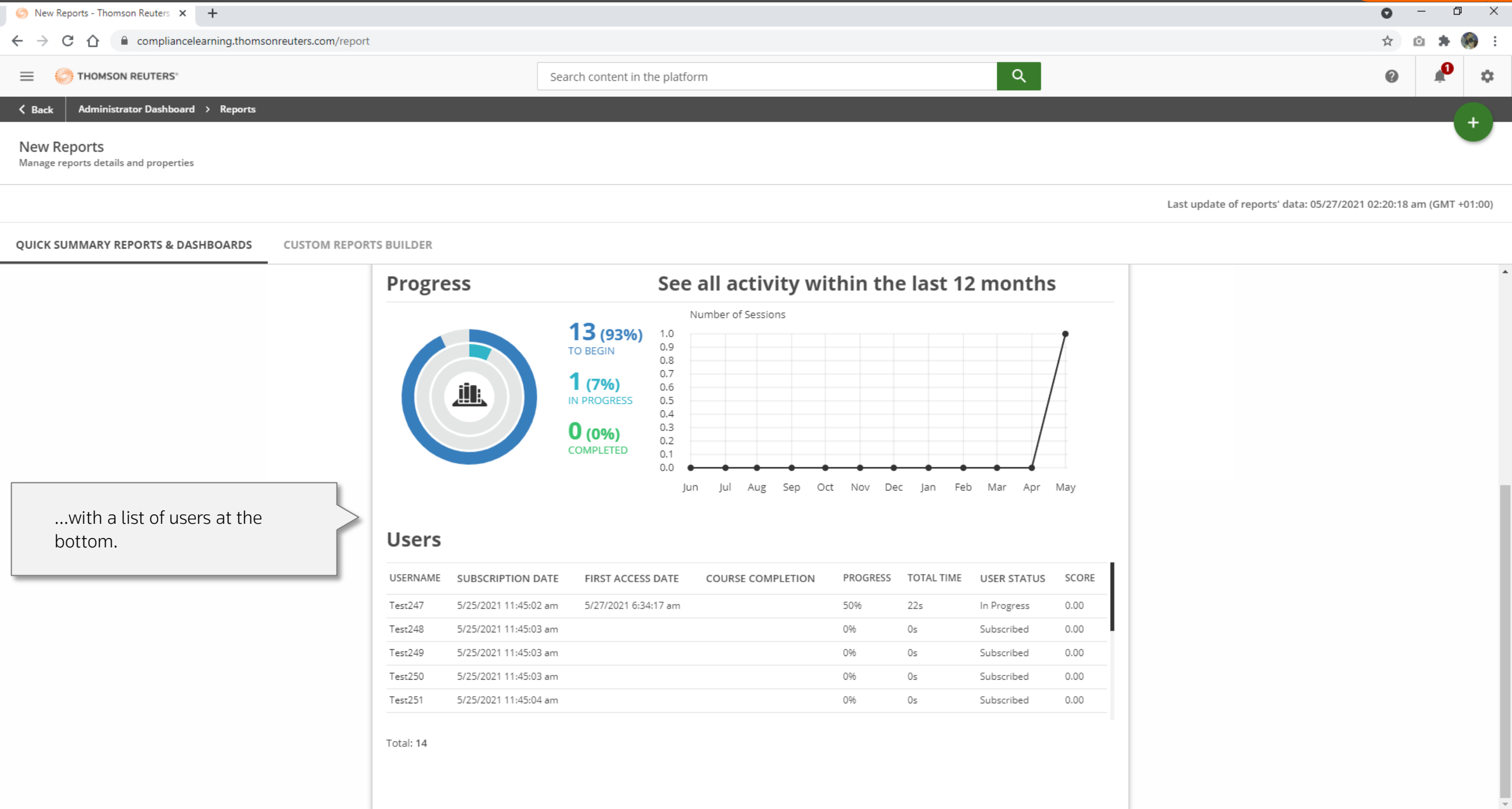
Course Summary (3)

Return to Menu



The top half of the page will show the course statistics...

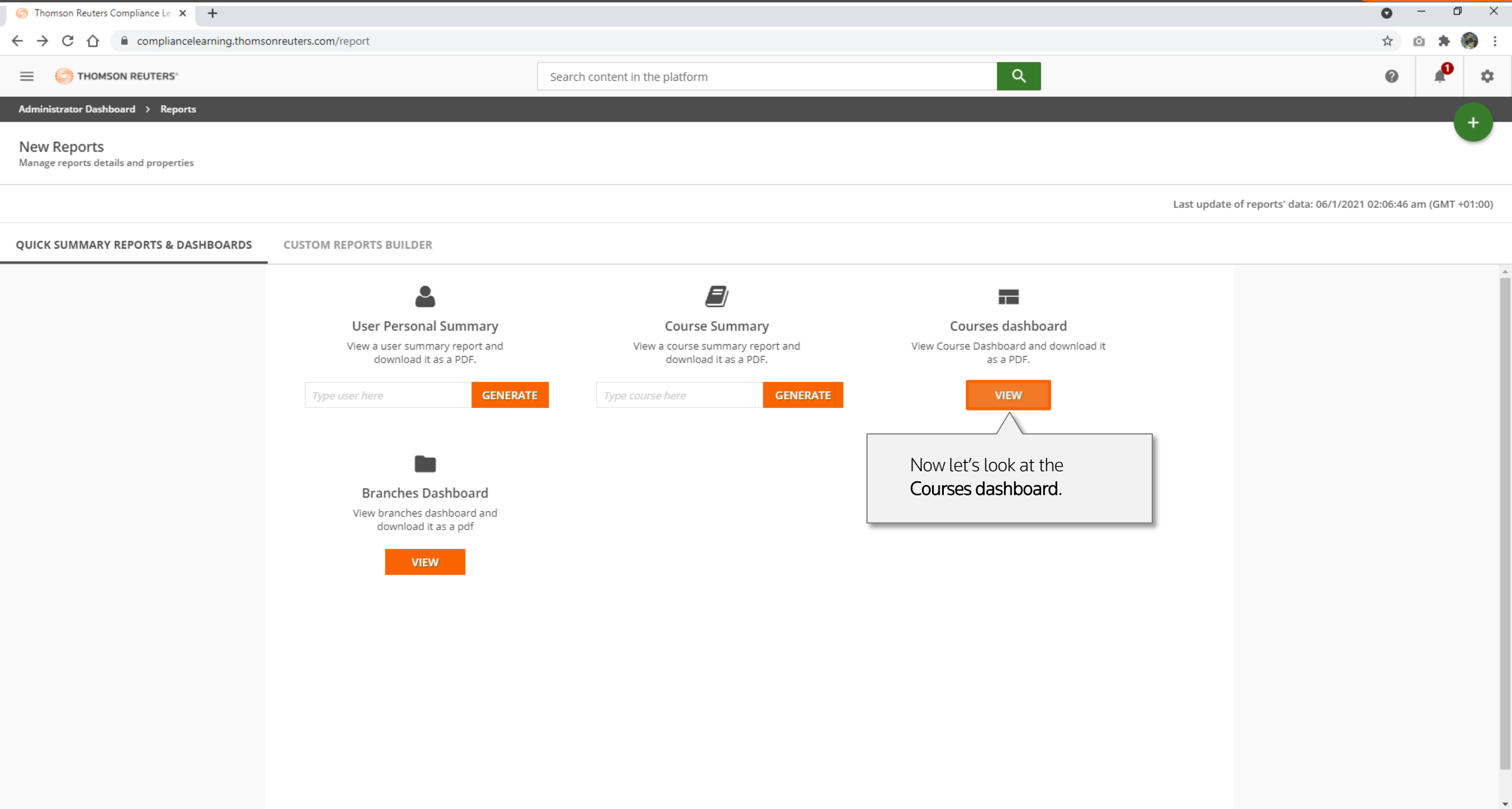
You can **print** or **download** the report.

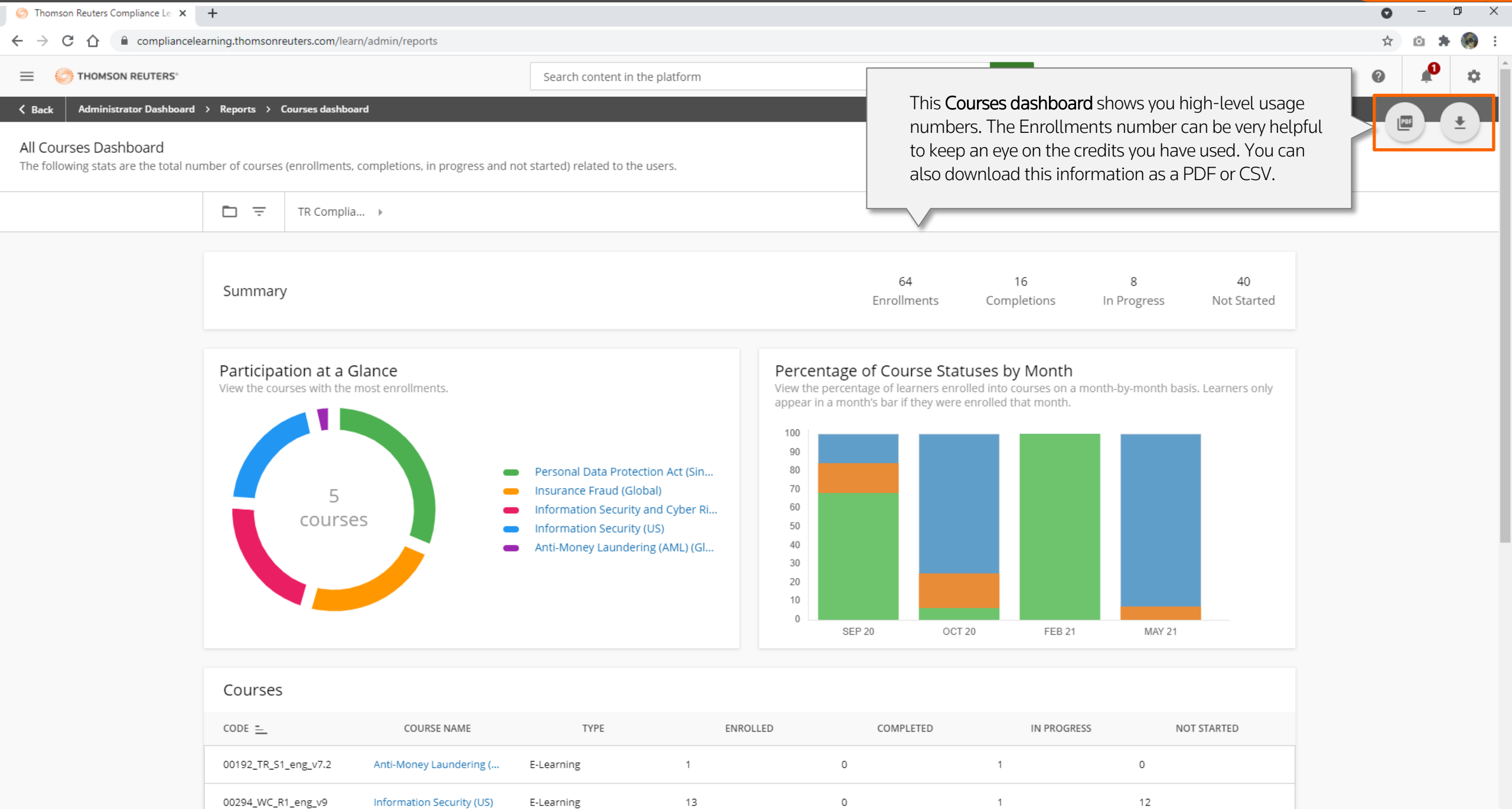


...with a list of users at the bottom.

Course Dashboard (1)

Return to Menu

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compliancelearning.thomsonreuters.com/learn/admin/reports
THOMSON REUTERS
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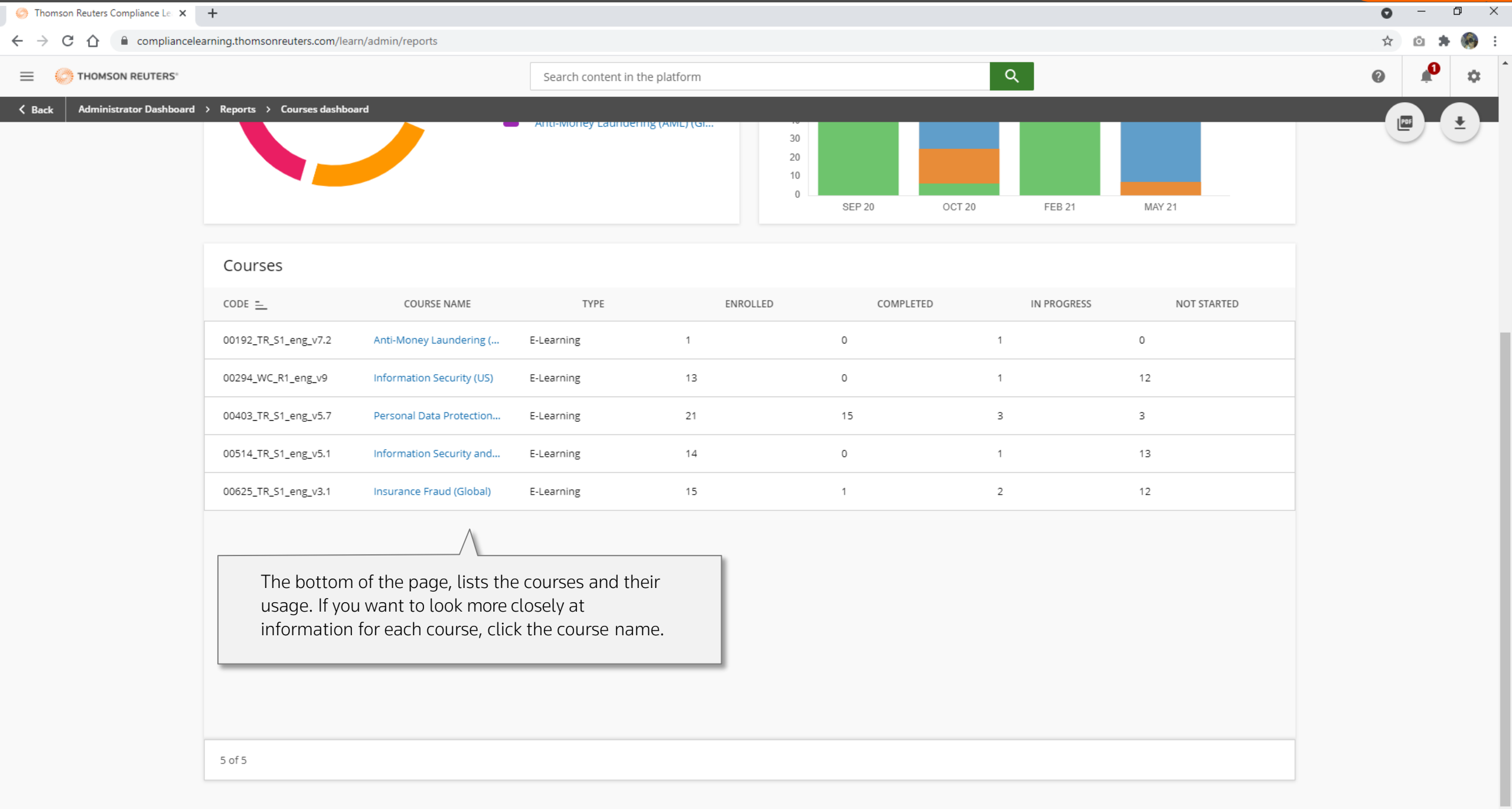
Back
Administrator Dashboard
Reports
Courses dashboard
All Courses Dashboard
The following stats are the total number of courses (enrollments, completions, in progress and not started) related to the users.
TR Complia...
This Courses dashboard shows you high-level usage numbers. The Enrollments number can be very helpful to keep an eye on the credits you have used. You can also download this information as a PDF or CSV.
Summary
64
Enrollments
16
Completions
8
In Progress
40
Not Started
Participation at a Glance
View the courses with the most enrollments.
5
courses
Personal Data Protection Act (Sin...
Insurance Fraud (Global)
Information Security and Cyber Ri...
Information Security (US)
Anti-Money Laundering (AML) (Gl...
Percentage of Course Statuses by Month
View the percentage of learners enrolled into courses on a month-by-month basis. Learners only appear in a month's bar if they were enrolled that month.
100
90
80
70
60
50
40
30
20
10
0
SEP 20
OCT 20
FEB 21
MAY 21
Courses
CODE
COURSE NAME
TYPE
ENROLLED
COMPLETED
IN PROGRESS
NOT STARTED
00192_TR_S1_eng_v7.2
Anti-Money Laundering (...
E-Learning
1
0
1
0
00294_WC_R1_eng_v9
Information Security (US)
E-Learning
13
0
1
12

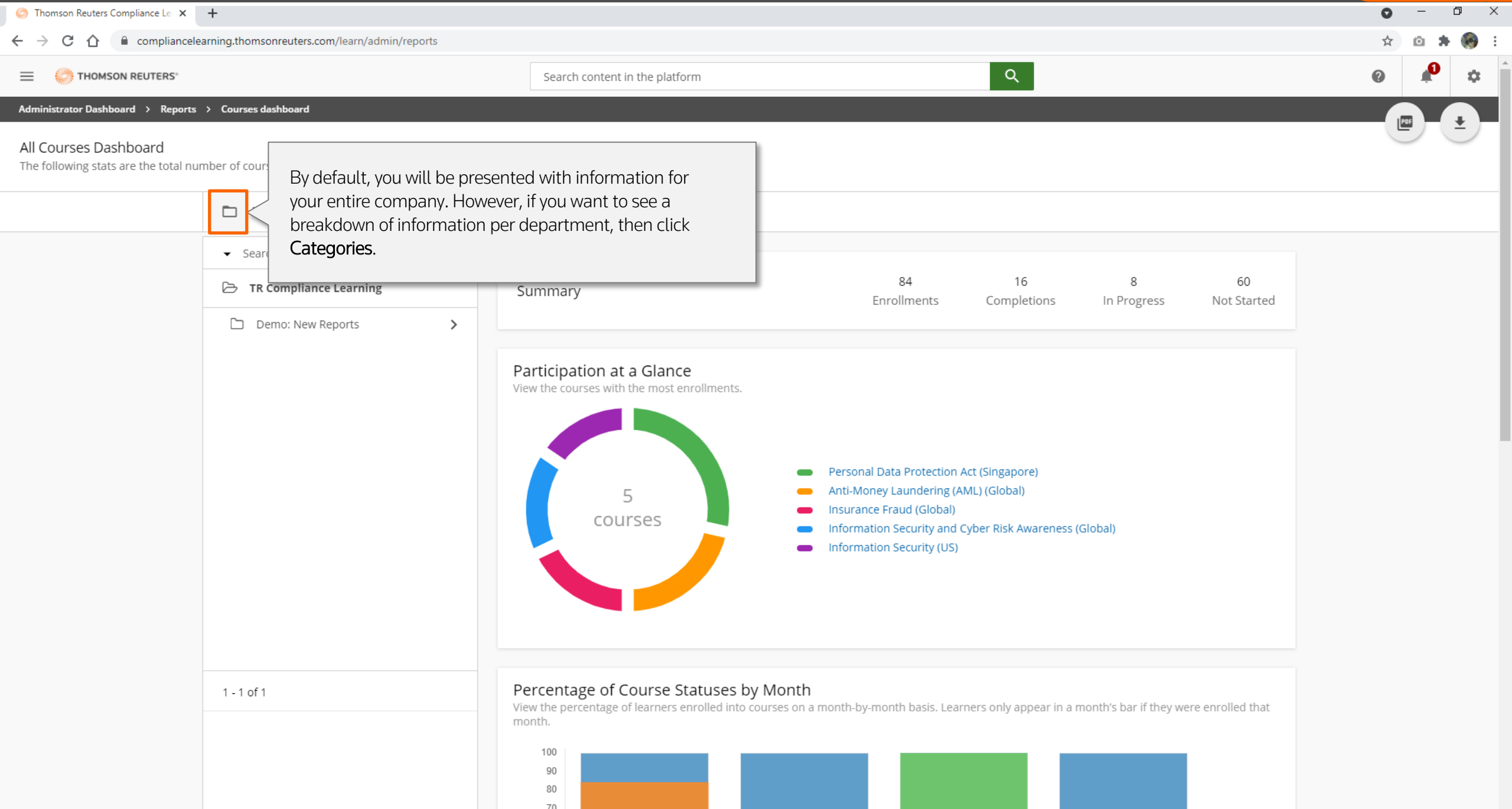


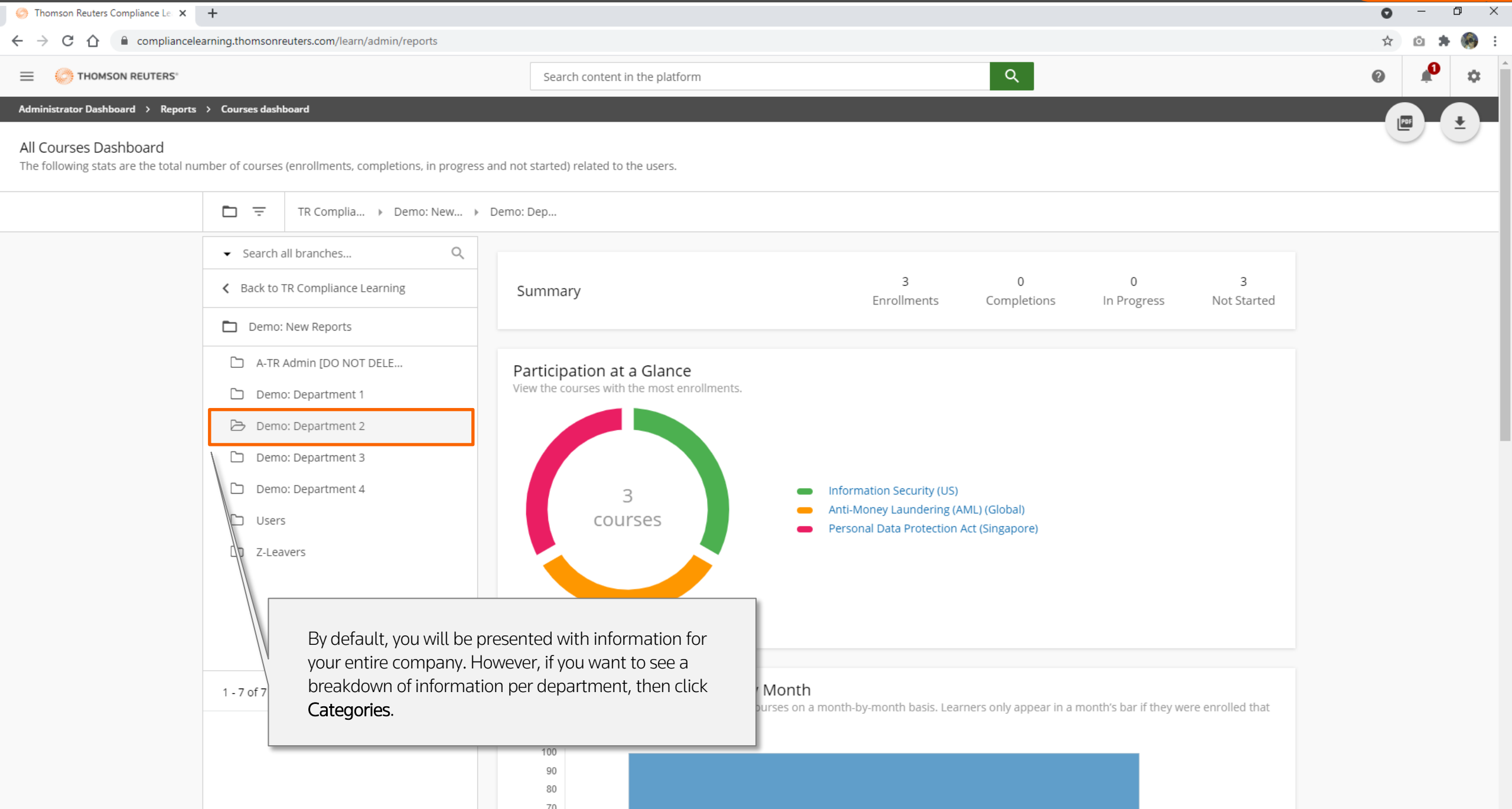
Courses

CODE	COURSE NAME	TYPE	ENROLLED	COMPLETED	IN PROGRESS	NOT STARTED
00192_TR_S1_eng_v7.2	Anti-Money Laundering (...	E-Learning	1	0	1	0
00294_WC_R1_eng_v9	Information Security (US)	E-Learning	13	0	1	12
00403_TR_S1_eng_v5.7	Personal Data Protection...	E-Learning	21	15	3	3
00514_TR_S1_eng_v5.1	Information Security and...	E-Learning	14	0	1	13
00625_TR_S1_eng_v3.1	Insurance Fraud (Global)	E-Learning	15	1	2	12

The bottom of the page, lists the courses and their usage. If you want to look more closely at information for each course, click the course name.

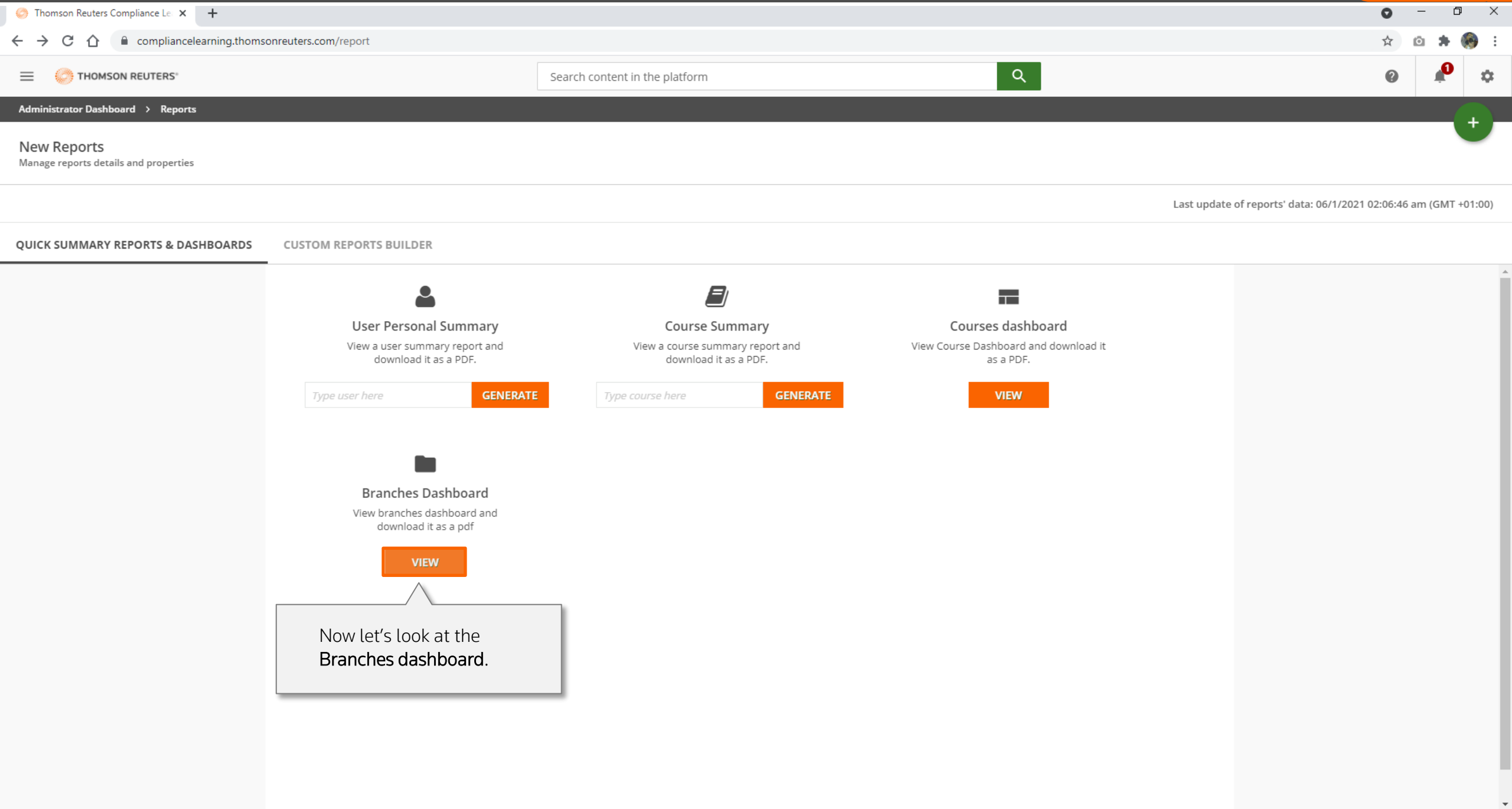
5 of 5


Thomson Reuters Compliance Le
compliancelearning.thomsonreuters.com/learn/admin/reports
THOMSON REUTERS
Search content in the platform
Administrator Dashboard > Reports > Courses dashboard
All Courses Dashboard
The following stats are the total number of cours
By default, you will be presented with information for your entire company. However, if you want to see a breakdown of information per department, then click Categories.
TR Compliance Learning
Demo: New Reports
1 - 1 of 1
Summary
84 Enrollments
16 Completions
8 In Progress
60 Not Started
Participation at a Glance
View the courses with the most enrollments.
5 courses
Personal Data Protection Act (Singapore)
Anti-Money Laundering (AML) (Global)
Insurance Fraud (Global)
Information Security and Cyber Risk Awareness (Global)
Information Security (US)
Percentage of Course Statuses by Month
View the percentage of learners enrolled into courses on a month-by-month basis. Learners only appear in a month's bar if they were enrolled that month.
100
90
80


Thomson Reuters Compliance Le
compliancelearning.thomsonreuters.com/learn/admin/reports
THOMSON REUTERS
Search content in the platform
Administrator Dashboard > Reports > Courses dashboard
All Courses Dashboard
The following stats are the total number of courses (enrollments, completions, in progress and not started) related to the users.
TR Complia... > Demo: New... > Demo: Dep...
Search all branches...
Back to TR Compliance Learning
Demo: New Reports
A-TR Admin [DO NOT DELE...
Demo: Department 1
Demo: Department 2
Demo: Department 3
Demo: Department 4
Users
Z-Leavers
1 - 7 of 7
Summary
3 Enrollments
0 Completions
0 In Progress
3 Not Started
Participation at a Glance
View the courses with the most enrollments.
3 courses
Information Security (US)
Anti-Money Laundering (AML) (Global)
Personal Data Protection Act (Singapore)
Month
urses on a month-by-month basis. Learners only appear in a month's bar if they were enrolled that
100
90
80
70
By default, you will be presented with information for your entire company. However, if you want to see a breakdown of information per department, then click Categories.

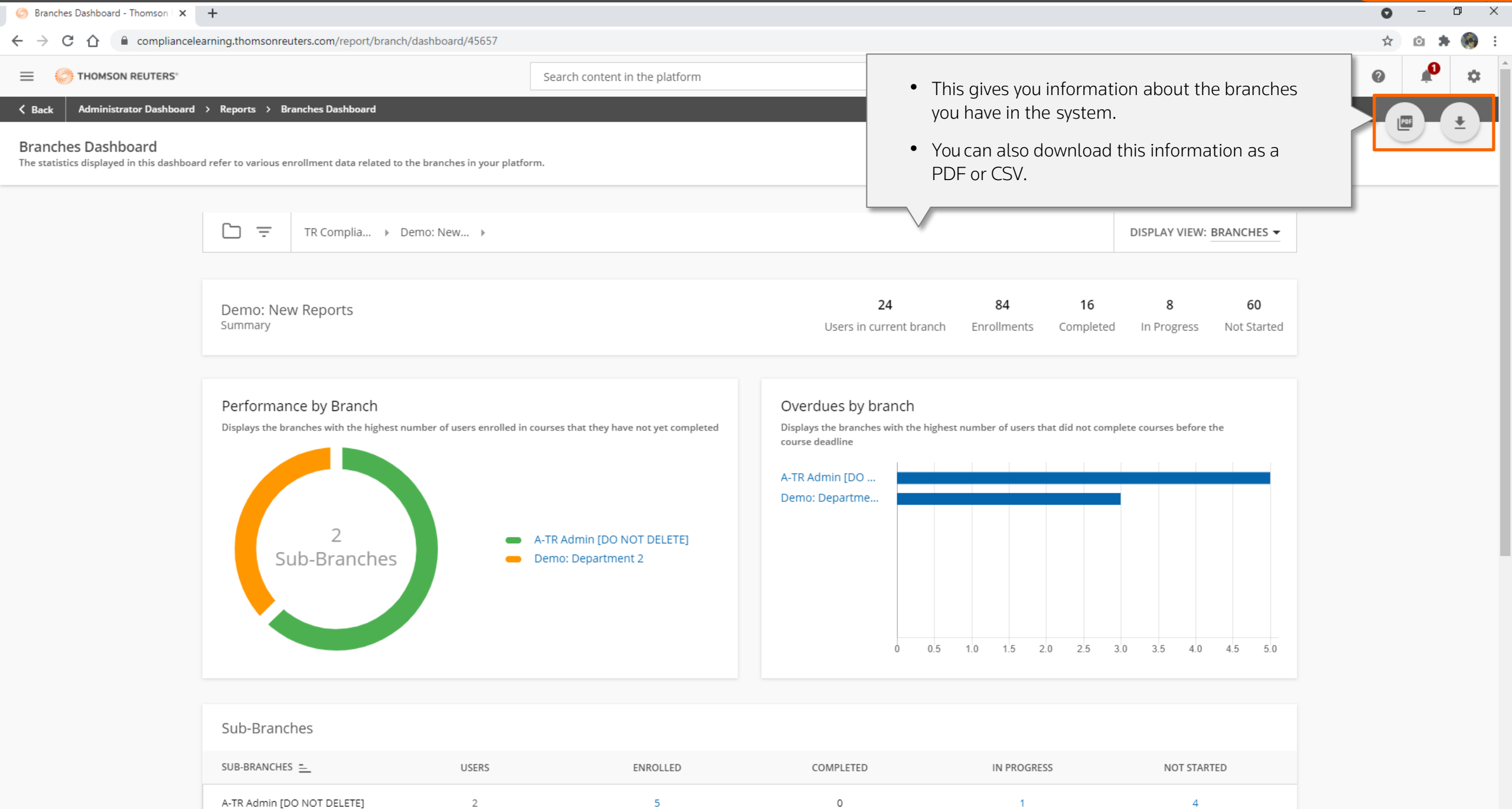
Branches Dashboard (1)

Return to Menu

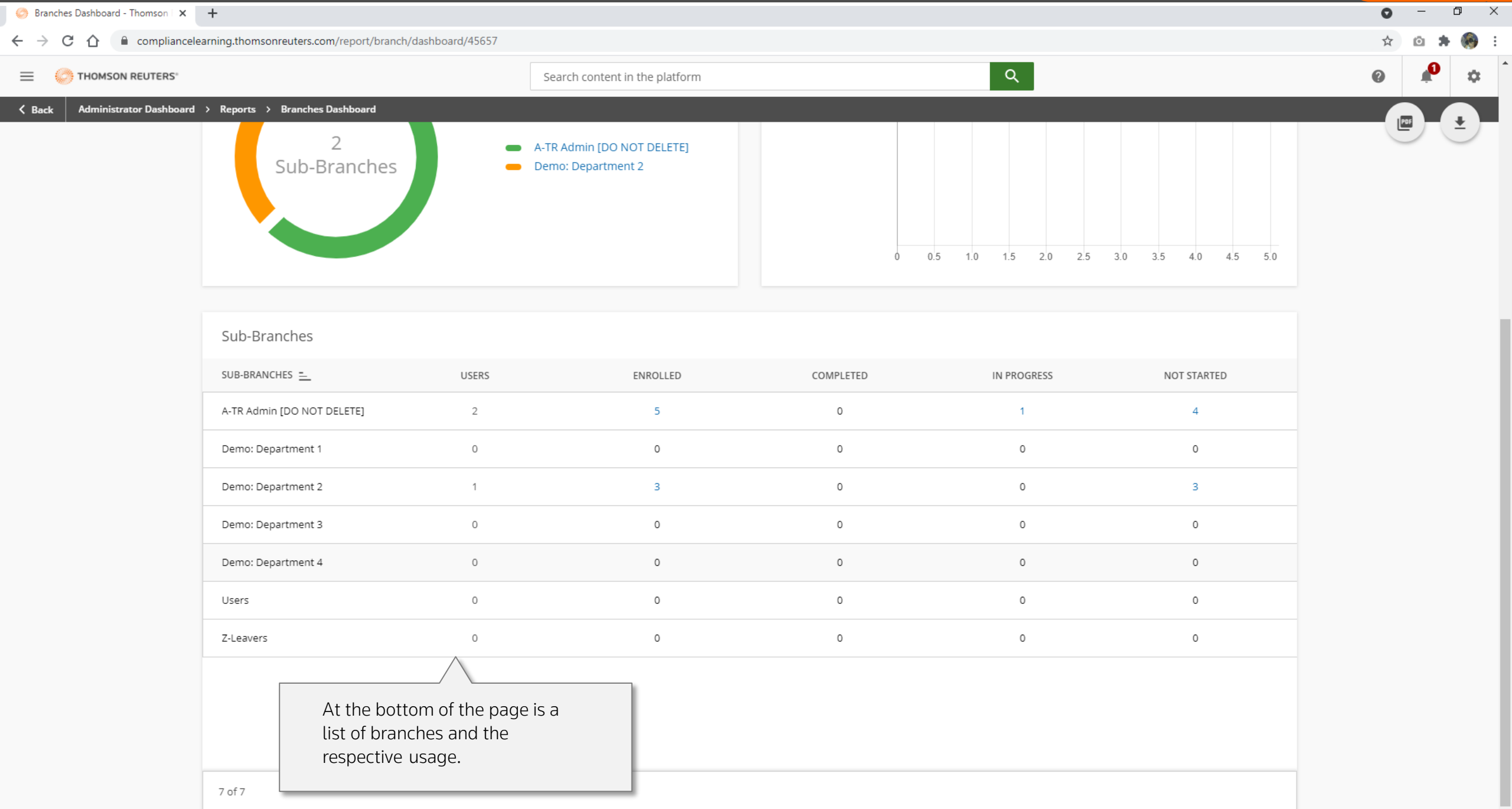


Branches Dashboard (2)

Return to Menu



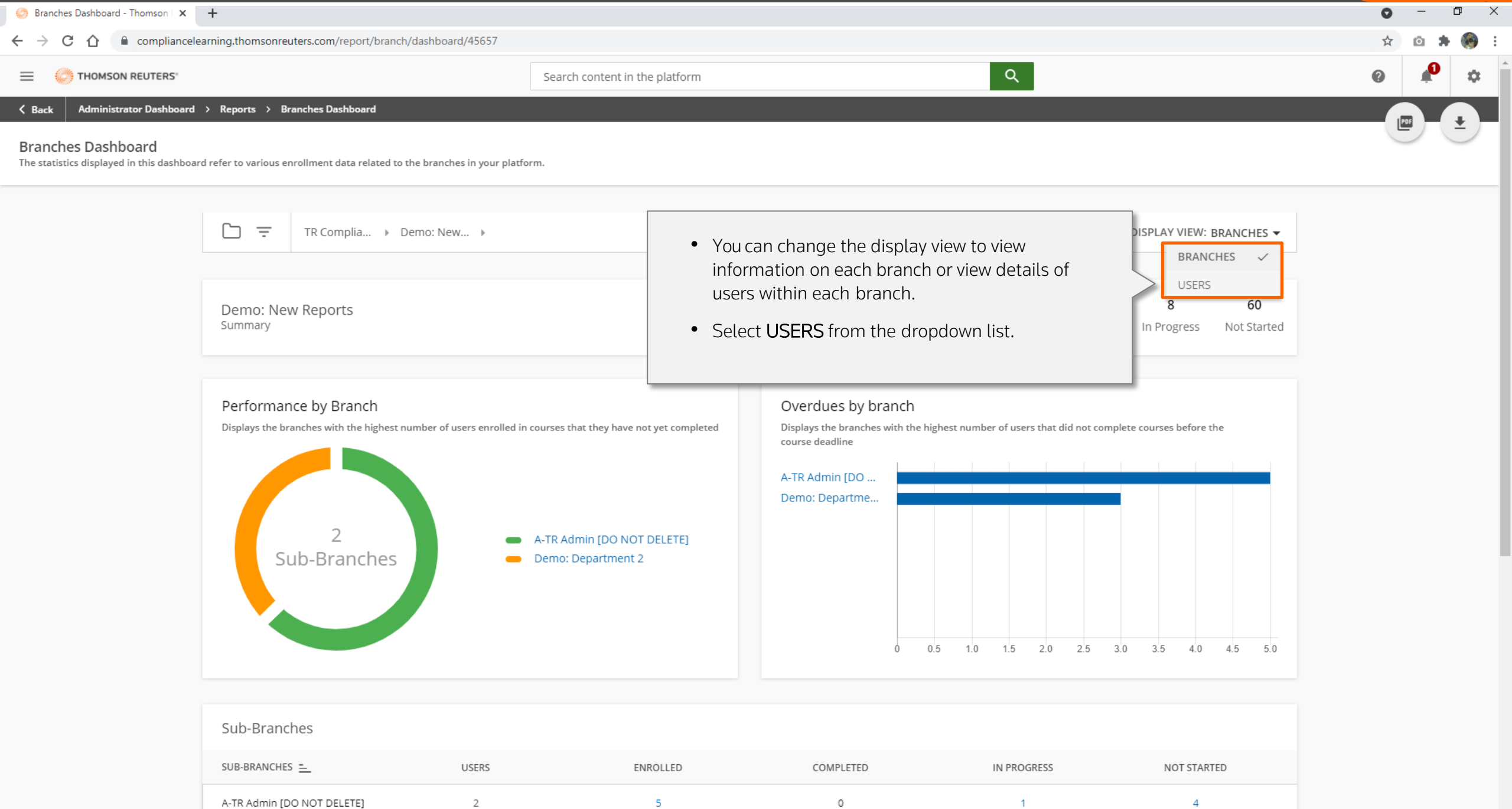
- This gives you information about the branches you have in the system.
- You can also download this information as a PDF or CSV.



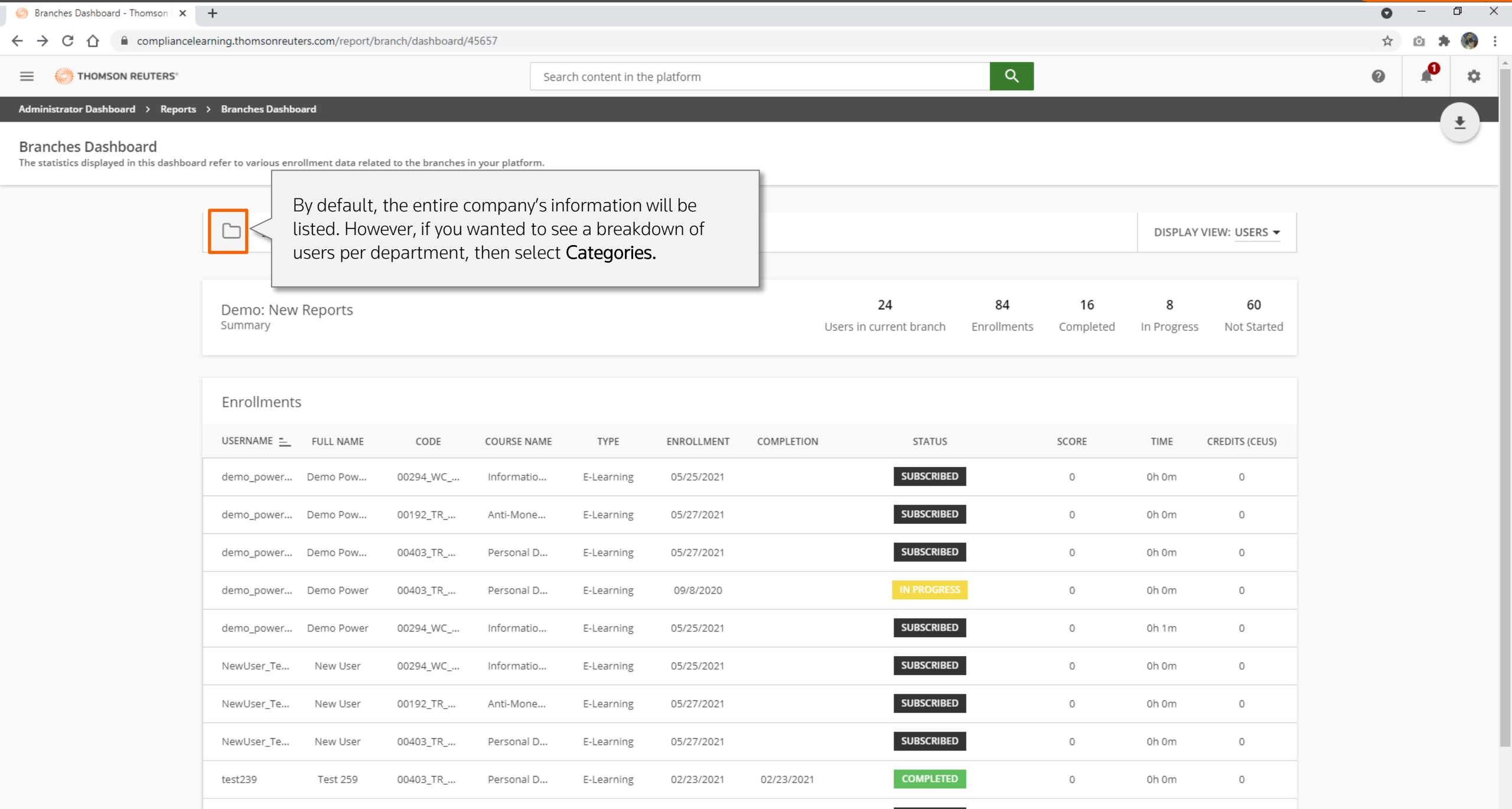
Sub-Branches

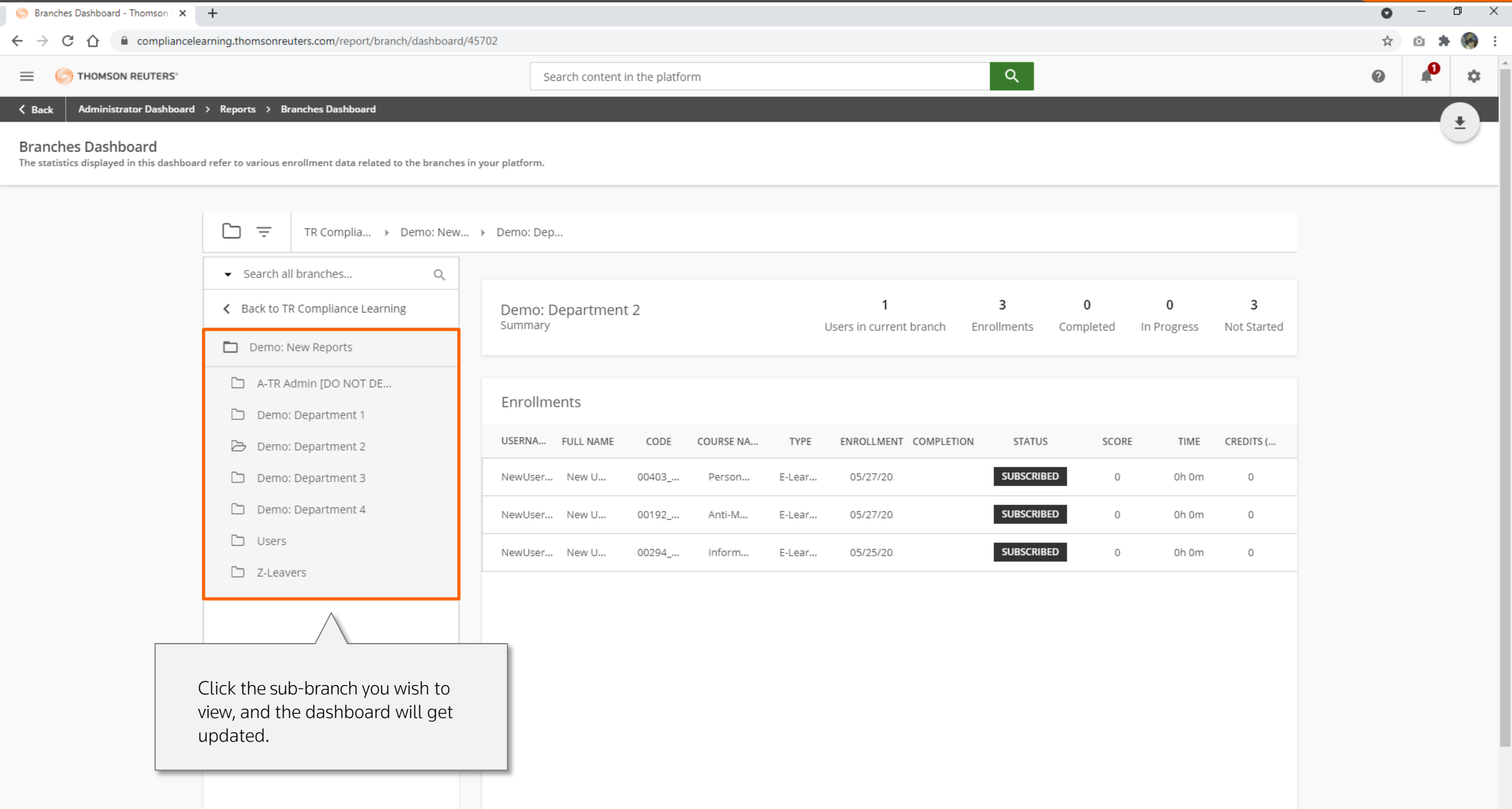
SUB-BRANCHES	USERS	ENROLLED	COMPLETED	IN PROGRESS	NOT STARTED
A-TR Admin [DO NOT DELETE]	2	5	0	1	4
Demo: Department 1	0	0	0	0	0
Demo: Department 2	1	3	0	0	3
Demo: Department 3	0	0	0	0	0
Demo: Department 4	0	0	0	0	0
Users	0	0	0	0	0
Z-Leavers	0	0	0	0	0

At the bottom of the page is a list of branches and the respective usage.



- You can change the display view to view information on each branch or view details of users within each branch.
- Select **USERS** from the dropdown list.


Branches Dashboard - Thomson
compliancelearning.thomsonreuters.com/report/branch/dashboard/45657
THOMSON REUTERS
Search content in the platform
Administrator Dashboard > Reports > Branches Dashboard
Branches Dashboard
The statistics displayed in this dashboard refer to various enrollment data related to the branches in your platform.
By default, the entire company's information will be listed. However, if you wanted to see a breakdown of users per department, then select Categories.
DISPLAY VIEW: USERS
Demo: New Reports
Summary
24
Users in current branch
84
Enrollments
16
Completed
8
In Progress
60
Not Started
Enrollments
USERNAME
FULL NAME
CODE
COURSE NAME
TYPE
ENROLLMENT
COMPLETION
STATUS
SCORE
TIME
CREDITS (CEUS)
demo_power... Demo Pow... 00294_WC_... Informatio... E-Learning 05/25/2021 SUBSCRIBED 0 0h 0m 0
demo_power... Demo Pow... 00192_TR_... Anti-Mone... E-Learning 05/27/2021 SUBSCRIBED 0 0h 0m 0
demo_power... Demo Pow... 00403_TR_... Personal D... E-Learning 05/27/2021 SUBSCRIBED 0 0h 0m 0
demo_power... Demo Power 00403_TR_... Personal D... E-Learning 09/8/2020 IN PROGRESS 0 0h 0m 0
demo_power... Demo Power 00294_WC_... Informatio... E-Learning 05/25/2021 SUBSCRIBED 0 0h 1m 0
NewUser_Te... New User 00294_WC_... Informatio... E-Learning 05/25/2021 SUBSCRIBED 0 0h 0m 0
NewUser_Te... New User 00192_TR_... Anti-Mone... E-Learning 05/27/2021 SUBSCRIBED 0 0h 0m 0
NewUser_Te... New User 00403_TR_... Personal D... E-Learning 05/27/2021 SUBSCRIBED 0 0h 0m 0
test239 Test 259 00403_TR_... Personal D... E-Learning 02/23/2021 02/23/2021 COMPLETED 0 0h 0m 0



Click the sub-branch you wish to view, and the dashboard will get updated.

Thomson Reuters Compliance Le

compliancelearning.thomsonreuters.com/report;tab=custom

THOMSON REUTERS

Search content in the platform

Administrator Dashboard > Reports

New Reports

Manage reports details and properties

Last update of reports' data: 05/27/2021 02:20:18 am (GMT +01:00)

QUICK SUMMARY REPORTS & DASHBOARDS | CUSTOM REPORTS BUILDER

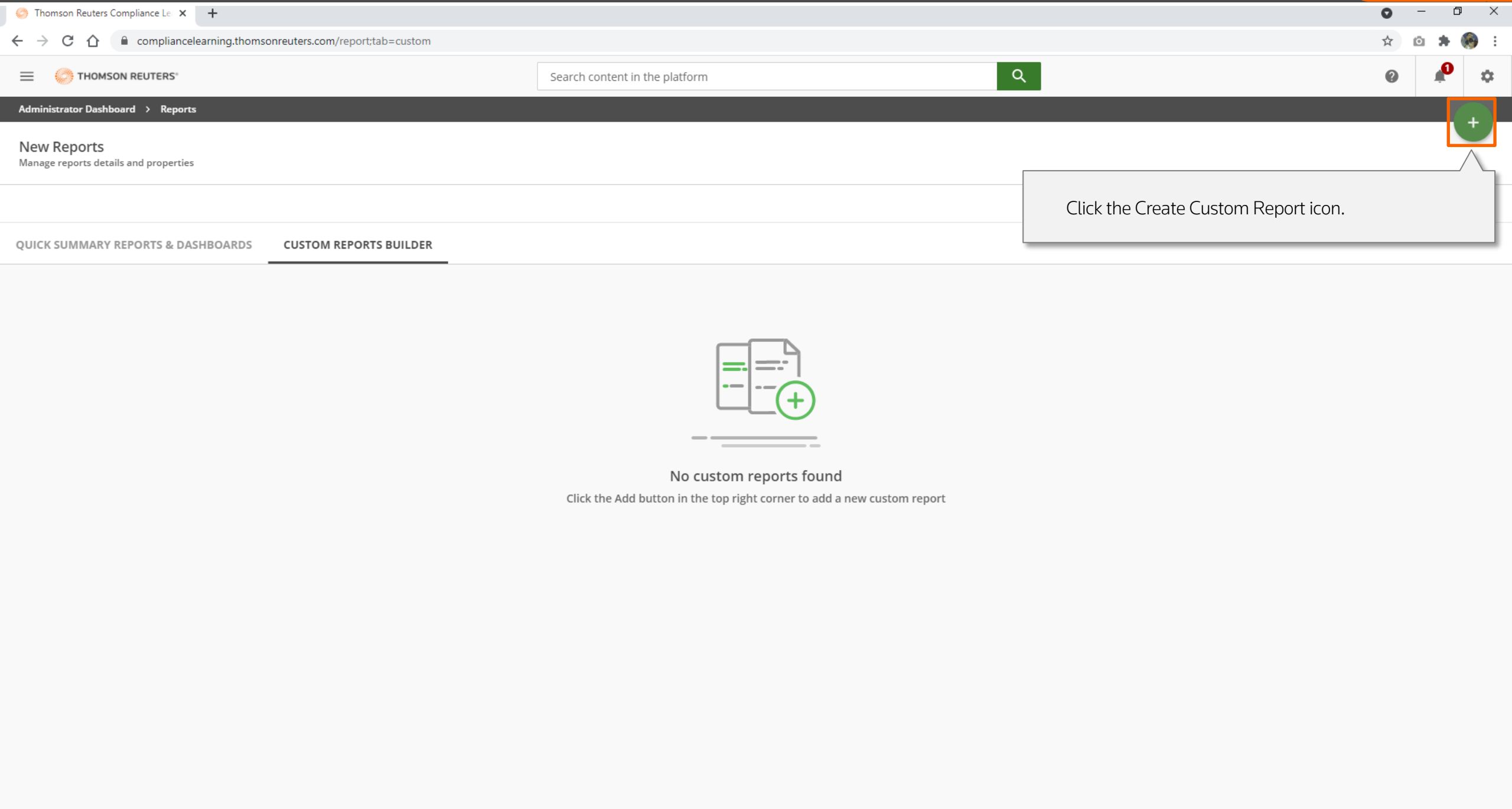
You can create custom reports by selecting **CUSTOM REPORTS BUILDER.**

No custom reports found

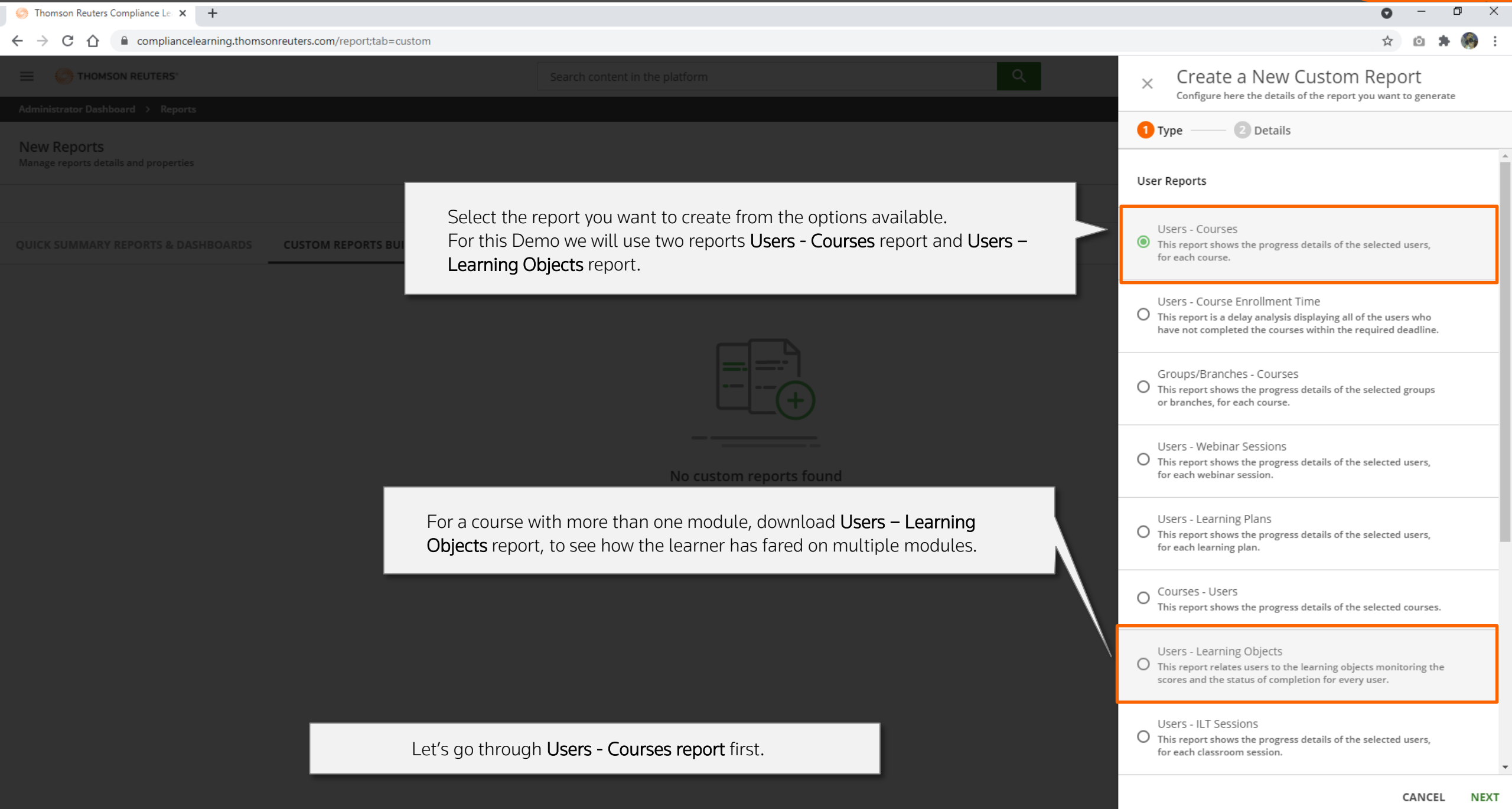
Click the Add button in the top right corner to add a new custom report

Creating a Custom Report (2)

Return to Menu



Click the Create Custom Report icon.



Select the report you want to create from the options available.
For this Demo we will use two reports **Users - Courses** report and **Users – Learning Objects** report.

For a course with more than one module, download **Users – Learning Objects** report, to see how the learner has fared on multiple modules.

Let's go through **Users - Courses report** first.

New Reports - Thomson Reuters

compliancelearning.thomsonreuters.com/report;tab=custom

THOMSON REUTERS

Search content in the platform

Back | Administrator Dashboard > Reports

New Reports

Manage reports details and properties

QUICK SUMMARY REPORTS & DASHBOARDS | CUSTOM REPORTS BUILDER

No custom reports found

Click the Add button in the top right corner to add a new custom report

Enter **Name** and **Description** of the report.

Create a New Custom Report

Configure here the details of the report you want to generate

1 Type — 2 Details

Name *

Example Report

14/150

Description

Demo Report

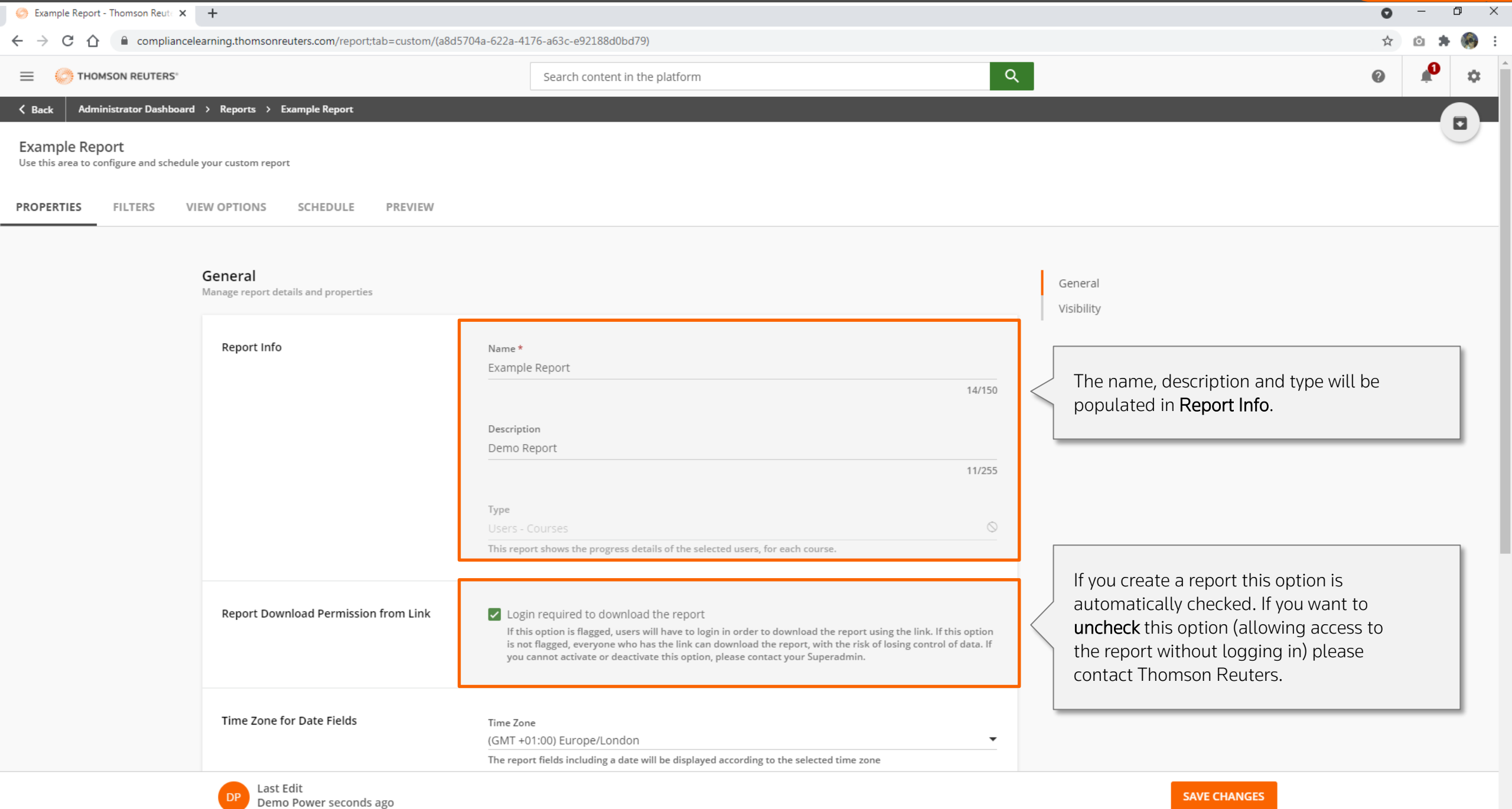
11/255

Select **Create & Edit** to begin.

PREVIOUS | CANCEL | CREATE AND EDIT

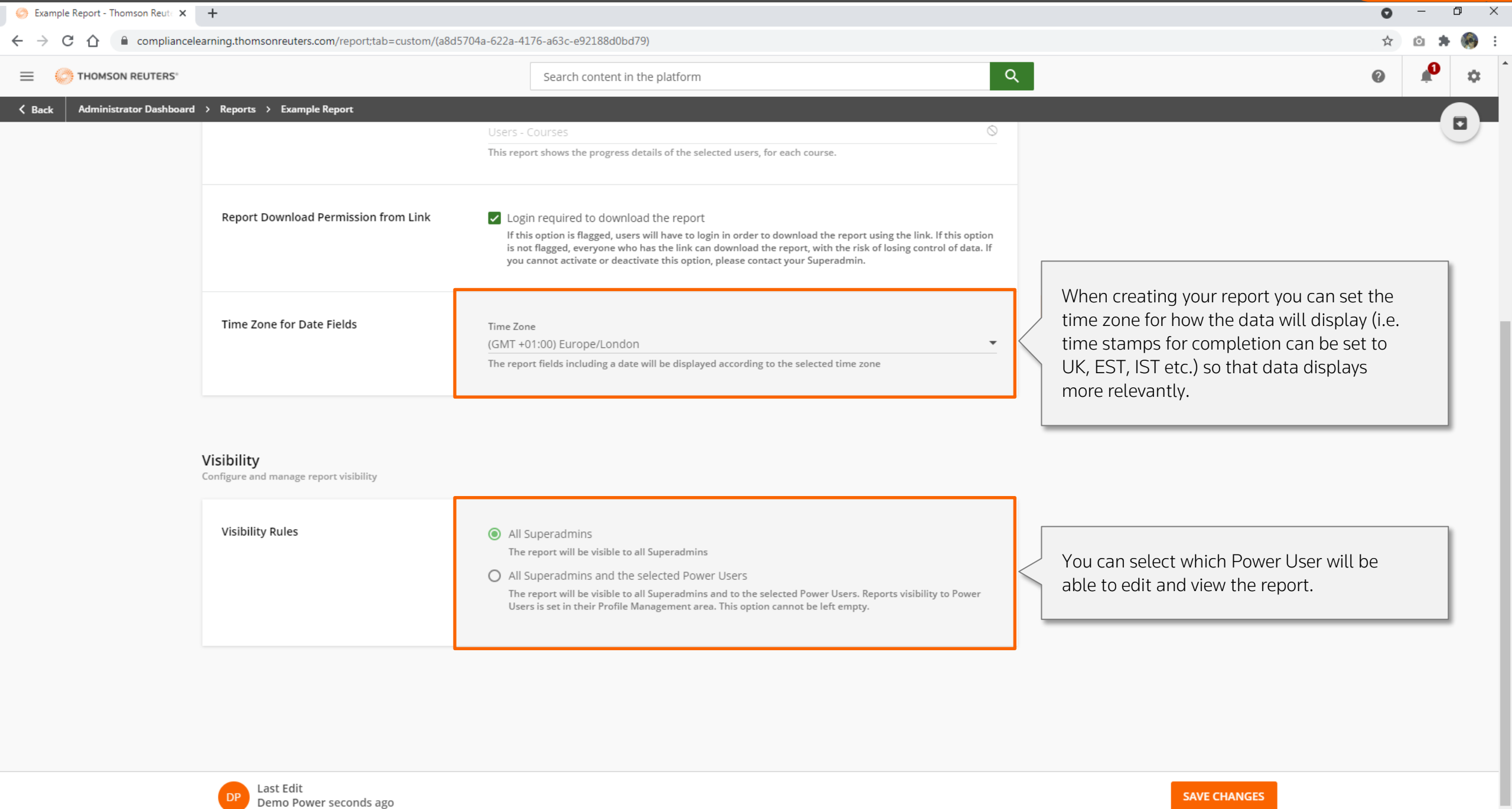
Users - Courses report (2)

Return to Menu



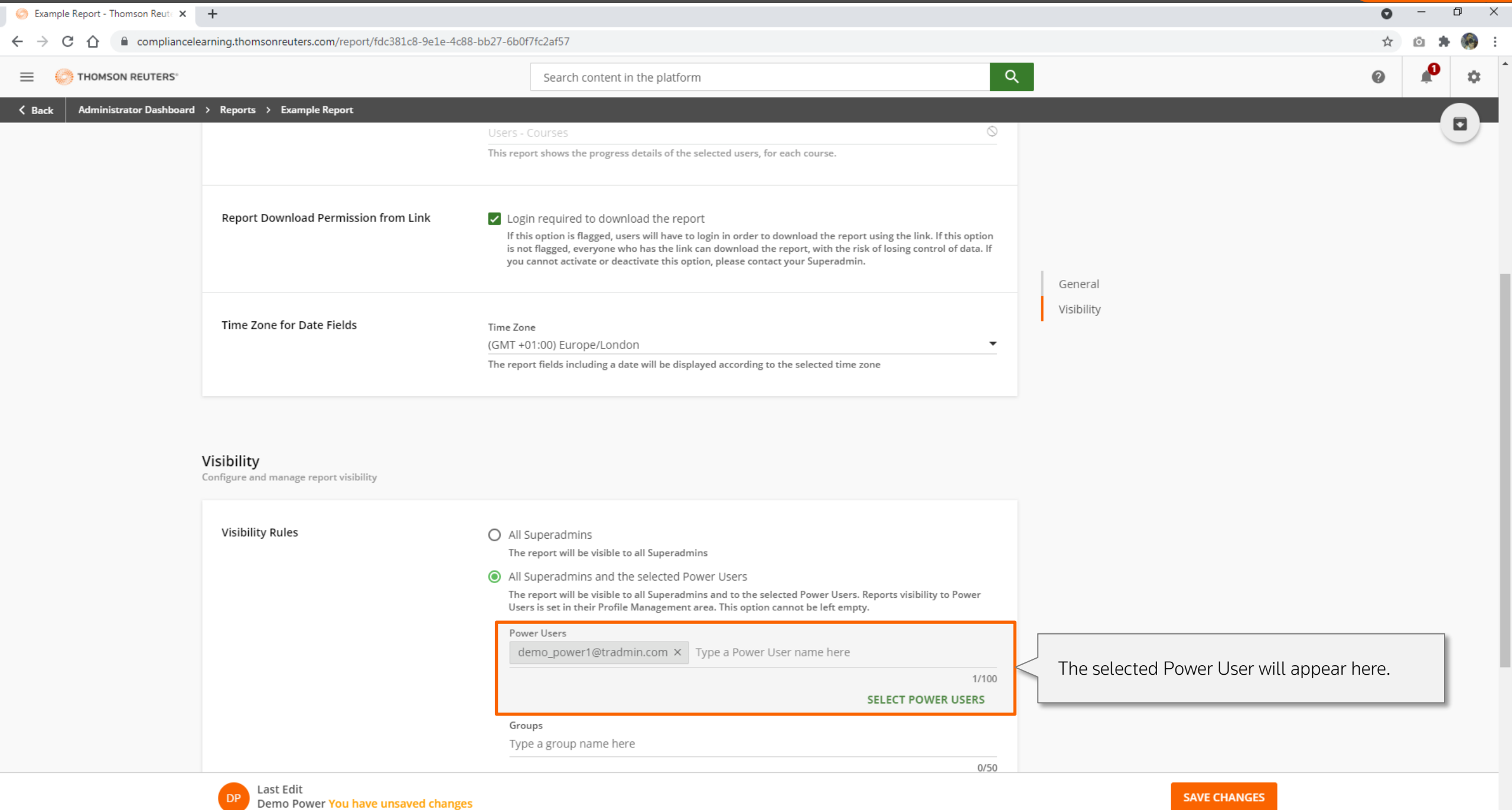
The name, description and type will be populated in **Report Info**.

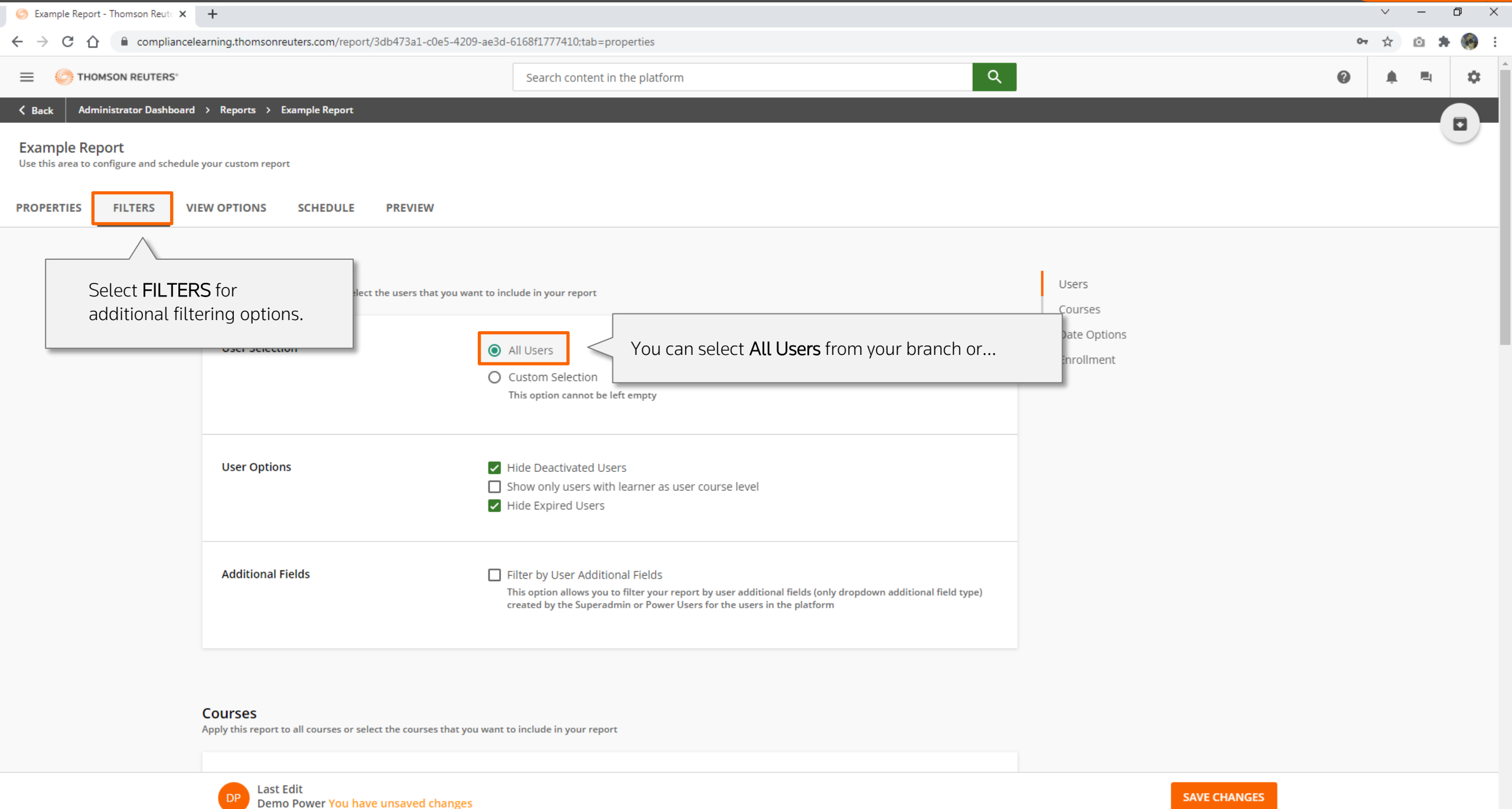
If you create a report this option is automatically checked. If you want to **uncheck** this option (allowing access to the report without logging in) please contact Thomson Reuters.

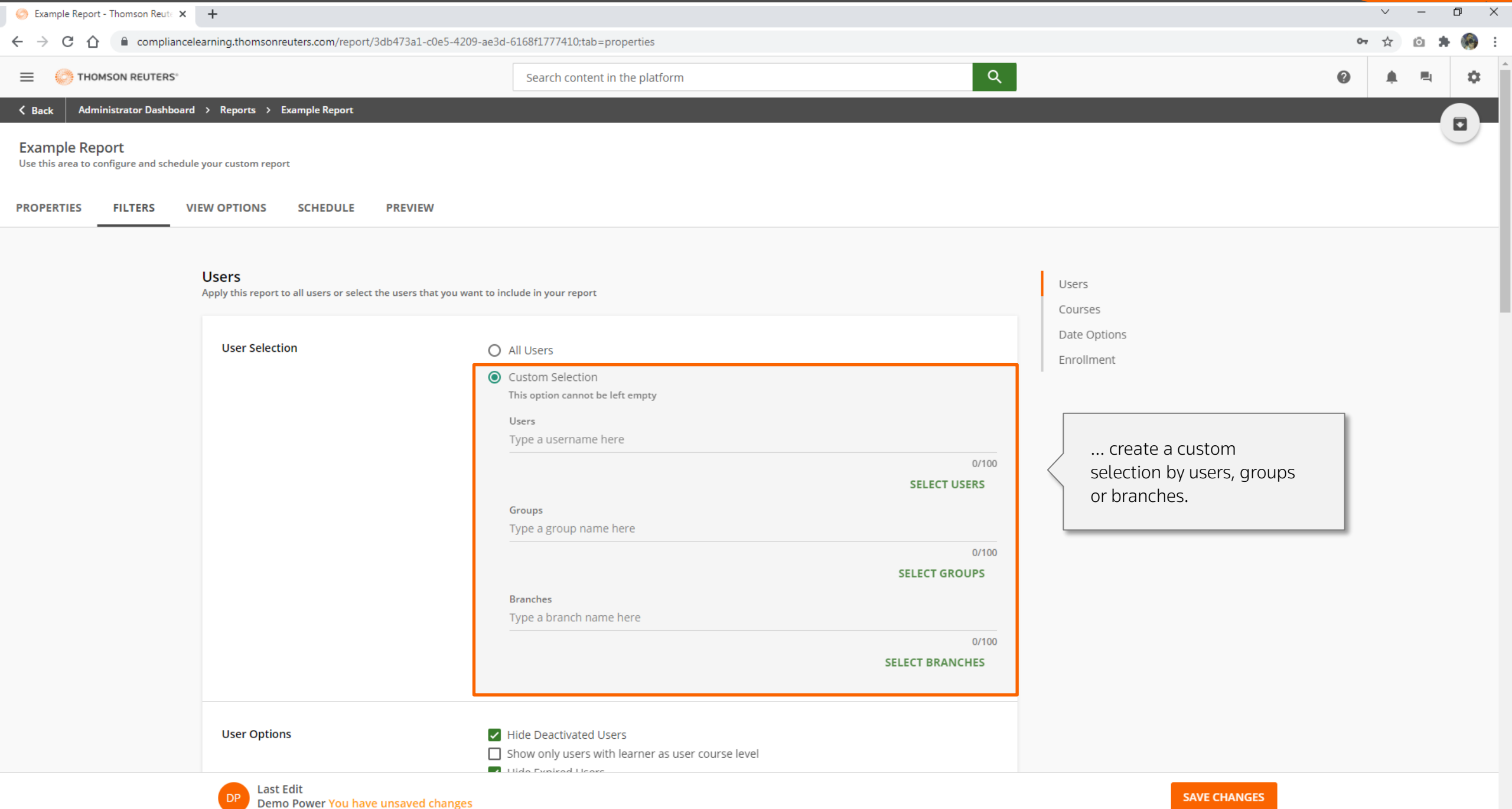


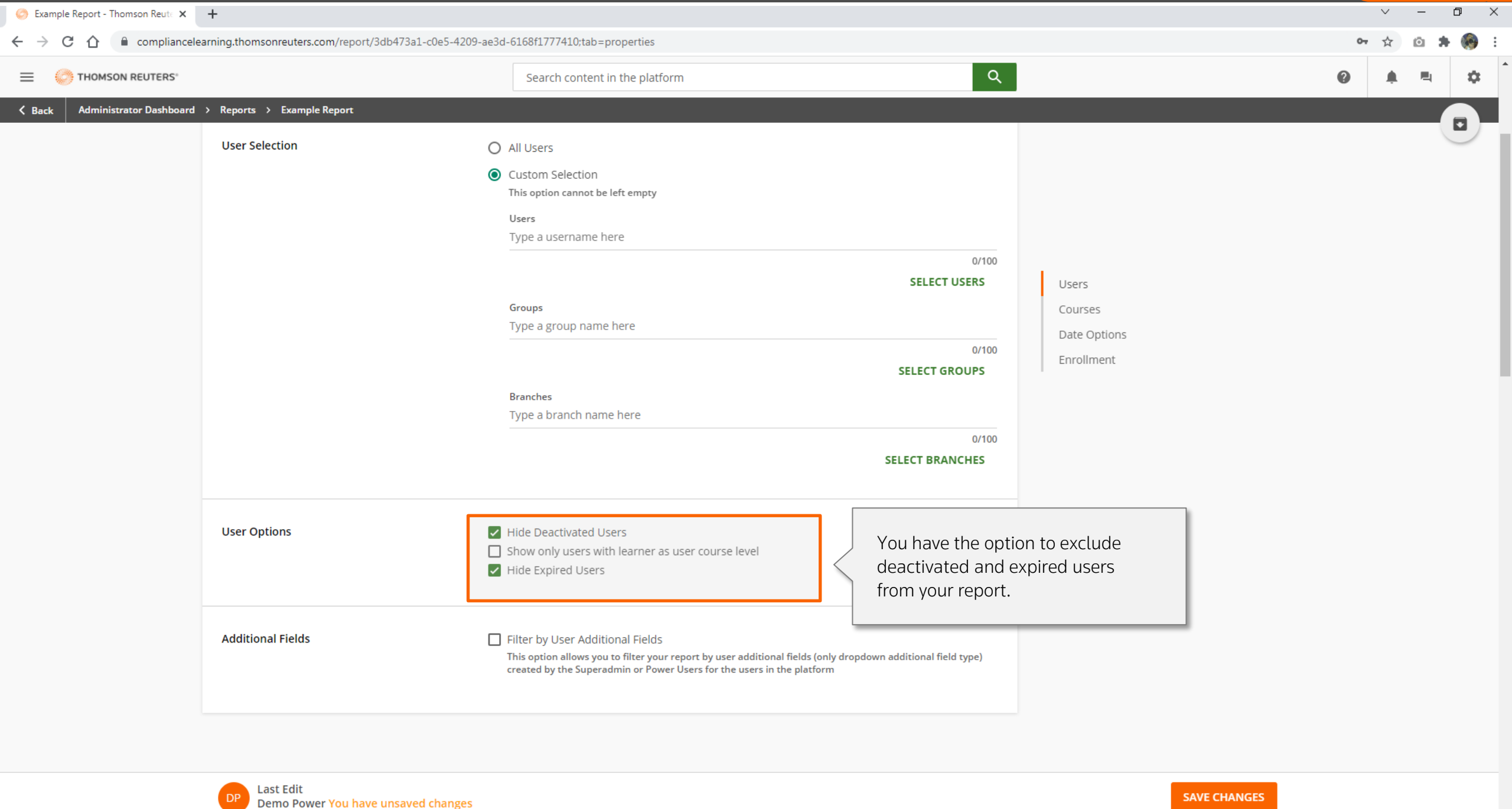
When creating your report you can set the time zone for how the data will display (i.e. time stamps for completion can be set to UK, EST, IST etc.) so that data displays more relevantly.

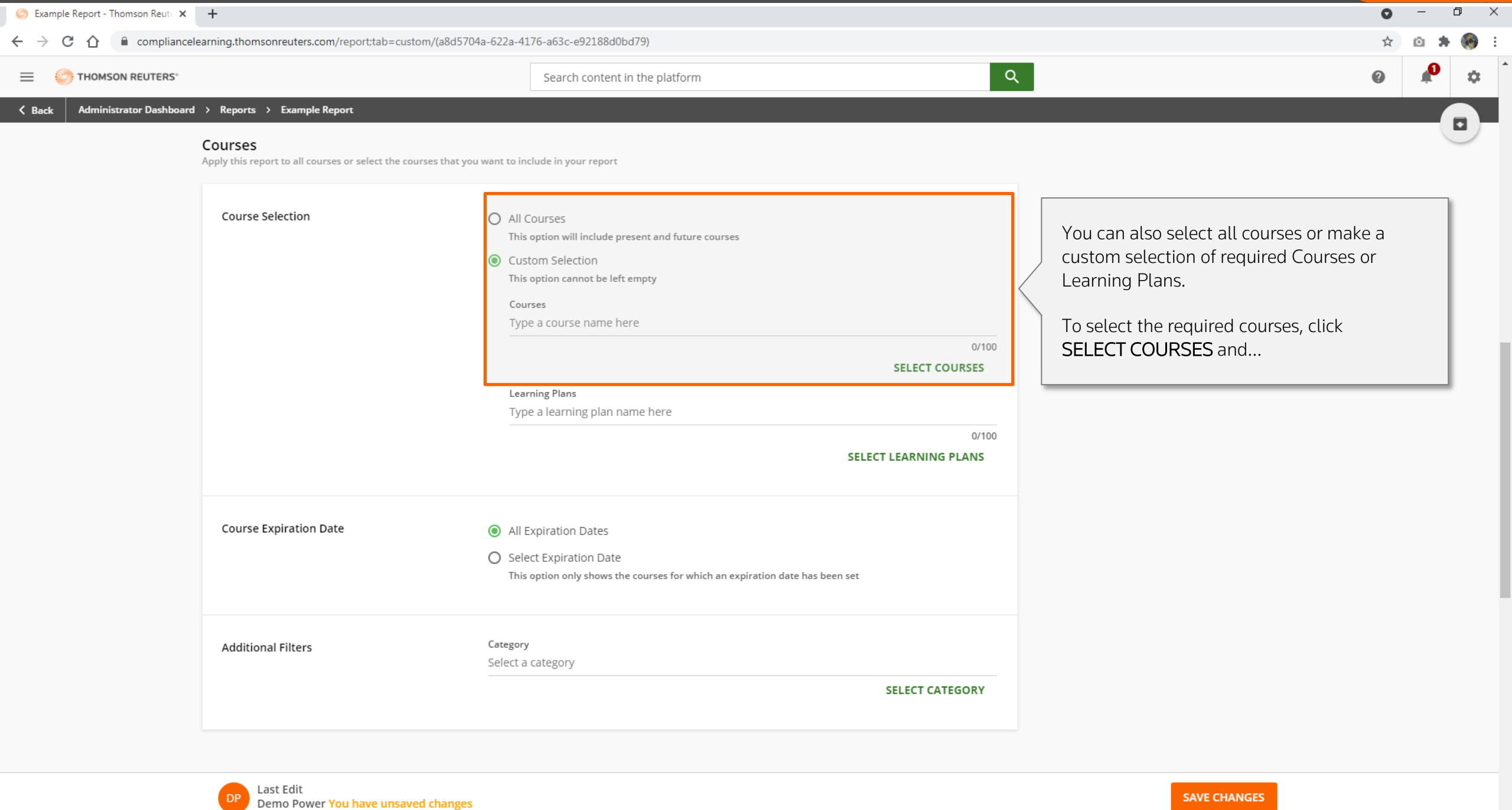
You can select which Power User will be able to edit and view the report.


Example Report - Thomson Reut
compliancelearning.thomsonreuters.com/report/fdc381c8-9e1e-4c88-bb27-6b0f7fc2af57
THOMSON REUTERS
Search content in the platform
Back
Administrator Dashboard
Reports
Example Report
Users - Courses
This report shows the progress details of the selected users, for each course.
Report Download Permission from Link
Login required to download the report
If this option is flagged, users will have to login in order to download the report using the link. If this option is not flagged, everyone who has the link can download the report, with the risk of losing control of data. If you cannot activate or deactivate this option, please contact your Superadmin.
Time Zone for Date Fields
Time Zone
(GMT +01:00) Europe/London
The report fields including a date will be displayed according to the selected time zone
General
Visibility
Visibility
Configure and manage report visibility
Visibility Rules
All Superadmins
The report will be visible to all Superadmins
All Superadmins and the selected Power Users
The report will be visible to all Superadmins and to the selected Power Users. Reports visibility to Power Users is set in their Profile Management area. This option cannot be left empty.
Power Users
demo_power1@tradmin.com
Type a Power User name here
1/100
SELECT POWER USERS
Groups
Type a group name here
0/50
The selected Power User will appear here.
DP
Last Edit
Demo Power You have unsaved changes
SAVE CHANGES


Example Report - Thomson Reute
compliancelearning.thomsonreuters.com/report/3db473a1-c0e5-4209-ae3d-6168f1777410;tab=properties
THOMSON REUTERS
Search content in the platform
Back
Administrator Dashboard
Reports
Example Report
Example Report
Use this area to configure and schedule your custom report
PROPERTIES
FILTERS
VIEW OPTIONS
SCHEDULE
PREVIEW
Select FILTERS for additional filtering options.
lect the users that you want to include in your report
All Users
Custom Selection
This option cannot be left empty
You can select All Users from your branch or...
Users
Courses
Date Options
Enrollment
User Options
Hide Deactivated Users
Show only users with learner as user course level
Hide Expired Users
Additional Fields
Filter by User Additional Fields
This option allows you to filter your report by user additional fields (only dropdown additional field type) created by the Superadmin or Power Users for the users in the platform
Courses
Apply this report to all courses or select the courses that you want to include in your report
DP
Last Edit
Demo Power You have unsaved changes
SAVE CHANGES

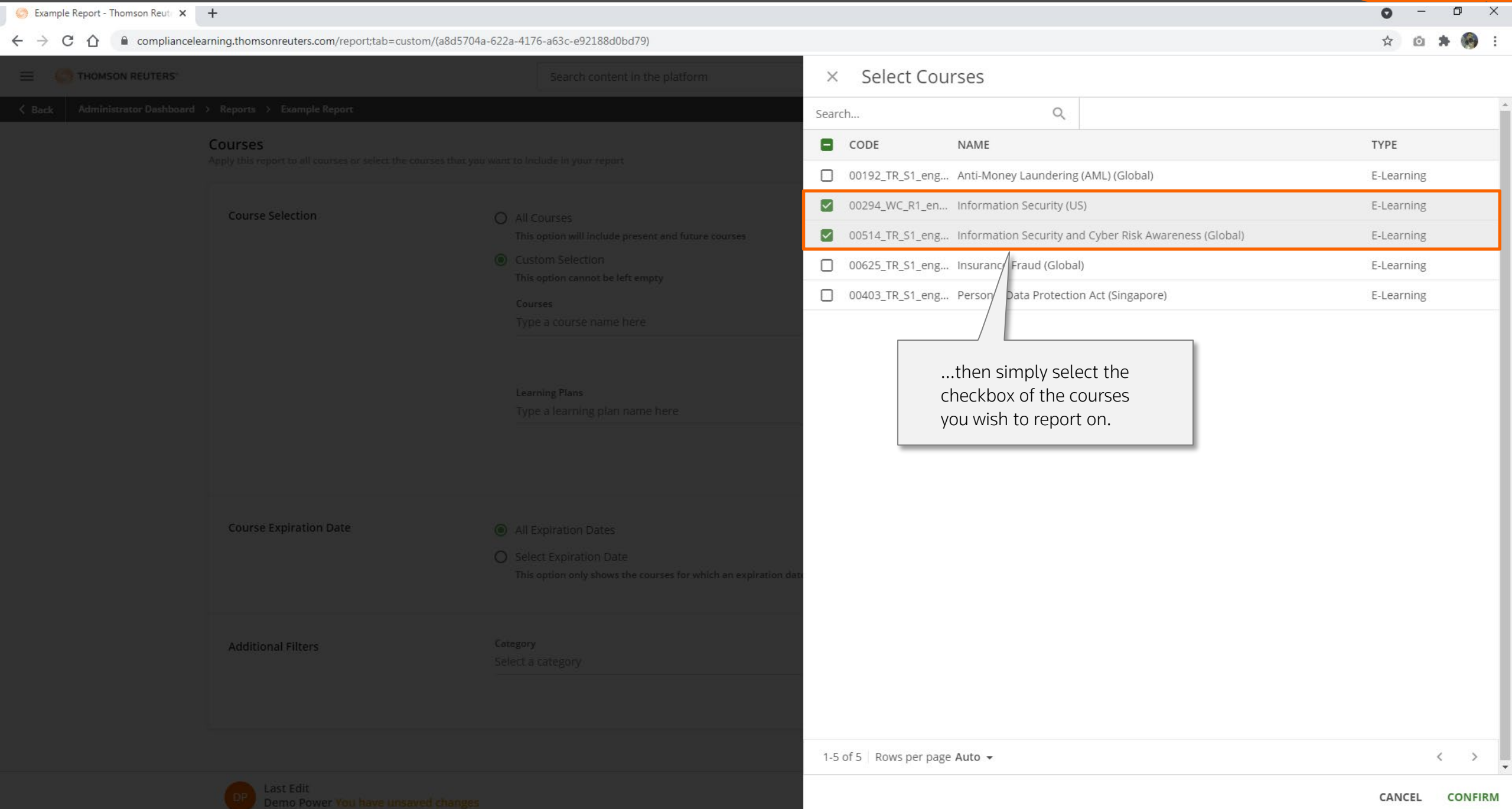

Example Report - Thomson Reute
compliancelearning.thomsonreuters.com/report/3db473a1-c0e5-4209-ae3d-6168f1777410;tab=properties
THOMSON REUTERS
Search content in the platform
Back
Administrator Dashboard
Reports
Example Report
Example Report
Use this area to configure and schedule your custom report
PROPERTIES
FILTERS
VIEW OPTIONS
SCHEDULE
PREVIEW
Users
Apply this report to all users or select the users that you want to include in your report
User Selection
All Users
Custom Selection
This option cannot be left empty
Users
Type a username here
0/100
SELECT USERS
Groups
Type a group name here
0/100
SELECT GROUPS
Branches
Type a branch name here
0/100
SELECT BRANCHES
User Options
Hide Deactivated Users
Show only users with learner as user course level
Users
Courses
Date Options
Enrollment
... create a custom selection by users, groups or branches.
DP
Last Edit
Demo Power You have unsaved changes
SAVE CHANGES

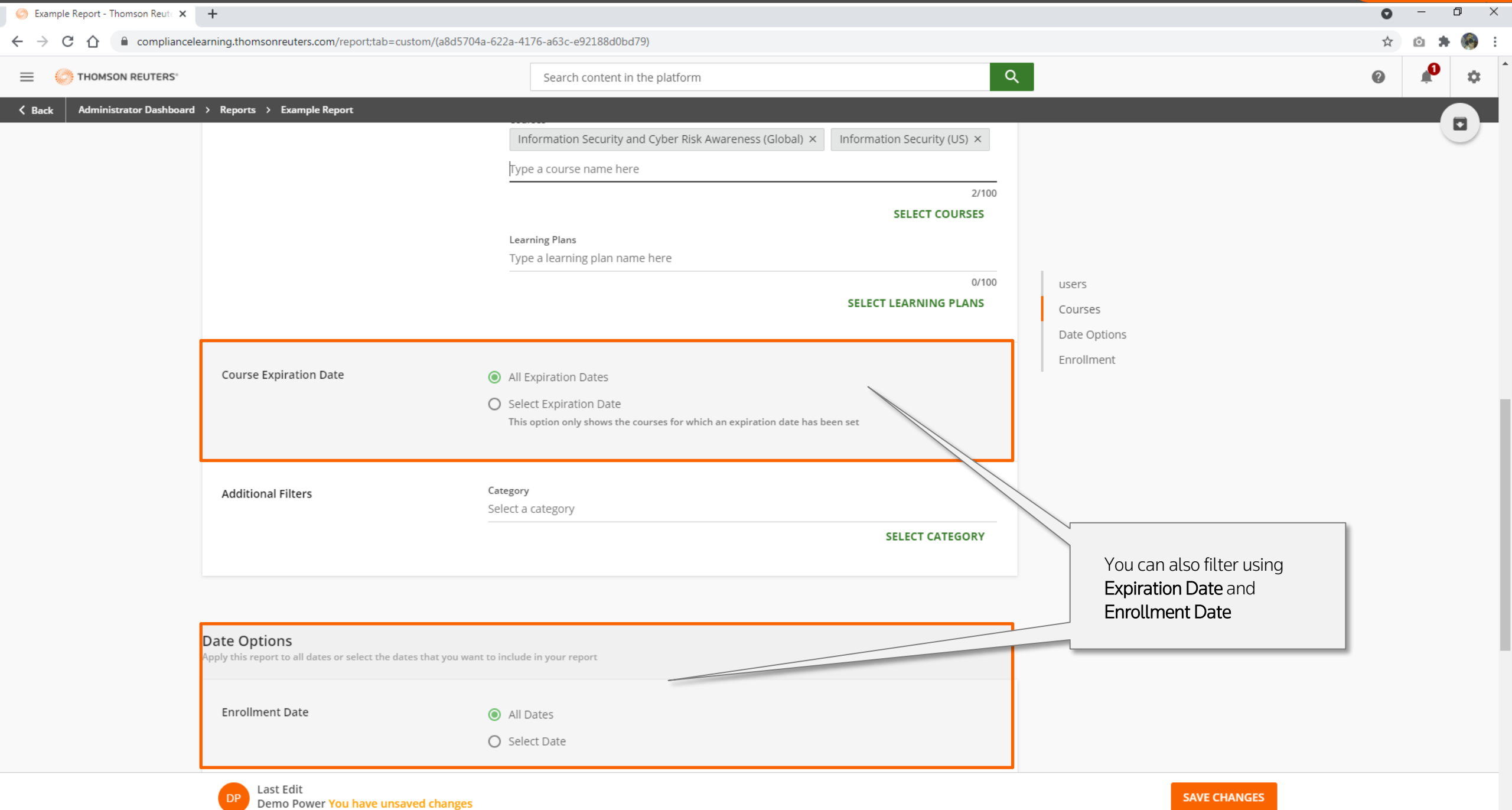

Example Report - Thomson Reute
compliancelearning.thomsonreuters.com/report/3db473a1-c0e5-4209-ae3d-6168f1777410;tab=properties
THOMSON REUTERS
Search content in the platform
Back
Administrator Dashboard
Reports
Example Report
User Selection
All Users
Custom Selection
This option cannot be left empty
Users
Type a username here
0/100
SELECT USERS
Groups
Type a group name here
0/100
SELECT GROUPS
Branches
Type a branch name here
0/100
SELECT BRANCHES
Users
Courses
Date Options
Enrollment
User Options
Hide Deactivated Users
Show only users with learner as user course level
Hide Expired Users
You have the option to exclude deactivated and expired users from your report.
Additional Fields
Filter by User Additional Fields
This option allows you to filter your report by user additional fields (only dropdown additional field type) created by the Superadmin or Power Users for the users in the platform
DP
Last Edit
Demo Power You have unsaved changes
SAVE CHANGES

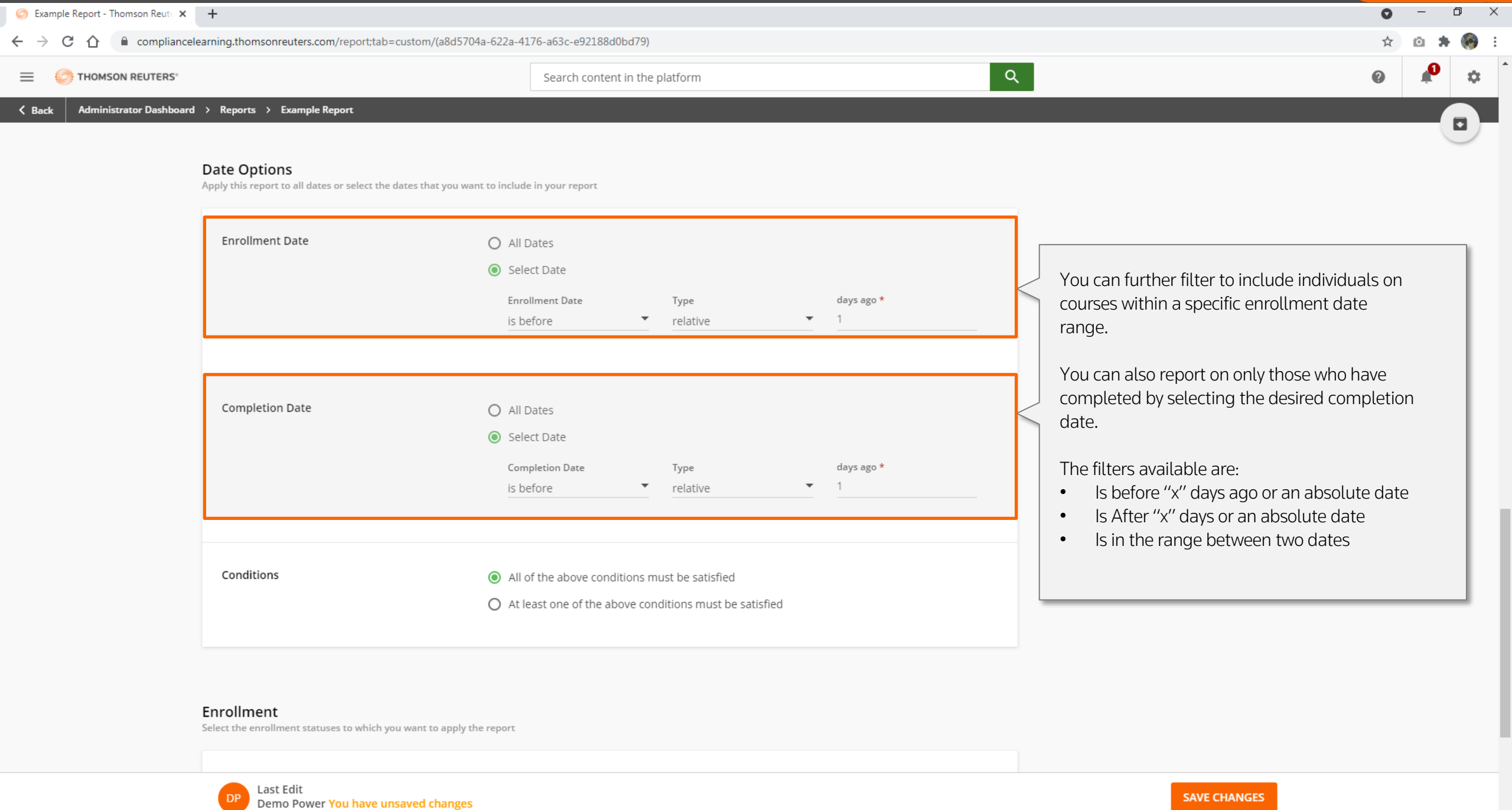


You can also select all courses or make a custom selection of required Courses or Learning Plans.

To select the required courses, click SELECT COURSES and...


Example Report - Thomson Reut
compliancelearning.thomsonreuters.com/report;tab=custom/(a8d5704a-622a-4176-a63c-e92188d0bd79)
THOMSON REUTERS
Search content in the platform
Back
Administrator Dashboard
Reports
Example Report
Courses
Apply this report to all courses or select the courses that you want to include in your report
Course Selection
All Courses
This option will include present and future courses
Custom Selection
This option cannot be left empty
Courses
Type a course name here
Learning Plans
Type a learning plan name here
Course Expiration Date
All Expiration Dates
Select Expiration Date
This option only shows the courses for which an expiration dat
Additional Filters
Category
Select a category
Last Edit
Demo Power
You have unsaved changes
Select Courses
Search...
CODE
NAME
TYPE
00192_TR_S1_eng...
Anti-Money Laundering (AML) (Global)
E-Learning
00294_WC_R1_en...
Information Security (US)
E-Learning
00514_TR_S1_eng...
Information Security and Cyber Risk Awareness (Global)
E-Learning
00625_TR_S1_eng...
Insuranc
Fraud (Global)
E-Learning
00403_TR_S1_eng...
Person
Data Protection Act (Singapore)
E-Learning
...then simply select the checkbox of the courses you wish to report on.
1-5 of 5
Rows per page Auto
CANCEL
CONFIRM


Example Report - Thomson Reut
compliancelearning.thomsonreuters.com/report;tab=custom/(a8d5704a-622a-4176-a63c-e92188d0bd79)
THOMSON REUTERS
Search content in the platform
Back
Administrator Dashboard
Reports
Example Report
Information Security and Cyber Risk Awareness (Global)
Information Security (US)
Type a course name here
2/100
SELECT COURSES
Learning Plans
Type a learning plan name here
0/100
SELECT LEARNING PLANS
users
Courses
Date Options
Enrollment
Course Expiration Date
All Expiration Dates
Select Expiration Date
This option only shows the courses for which an expiration date has been set
Additional Filters
Category
Select a category
SELECT CATEGORY
You can also filter using Expiration Date and Enrollment Date
Date Options
Apply this report to all dates or select the dates that you want to include in your report
Enrollment Date
All Dates
Select Date
DP
Last Edit
Demo Power You have unsaved changes
SAVE CHANGES

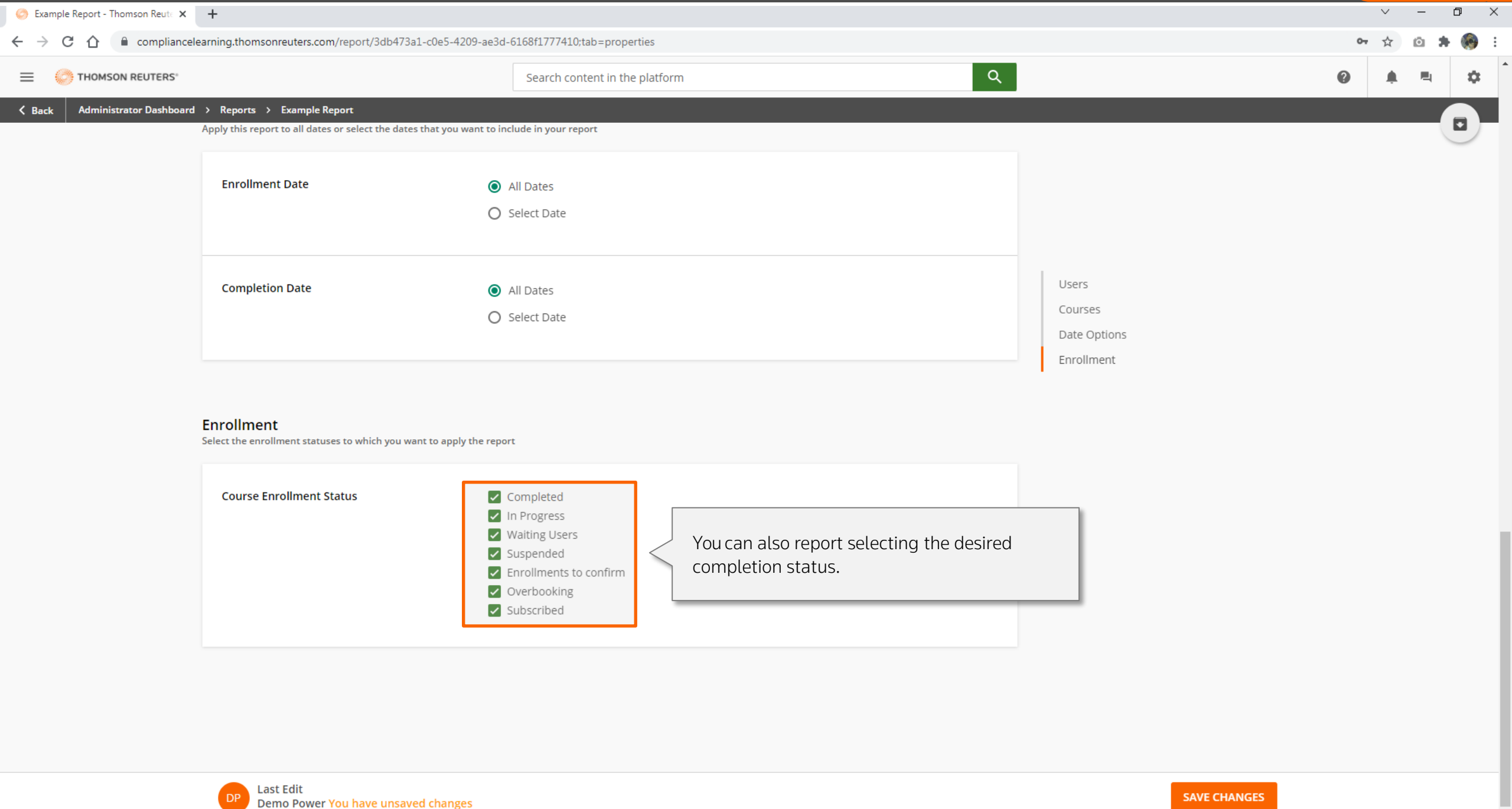


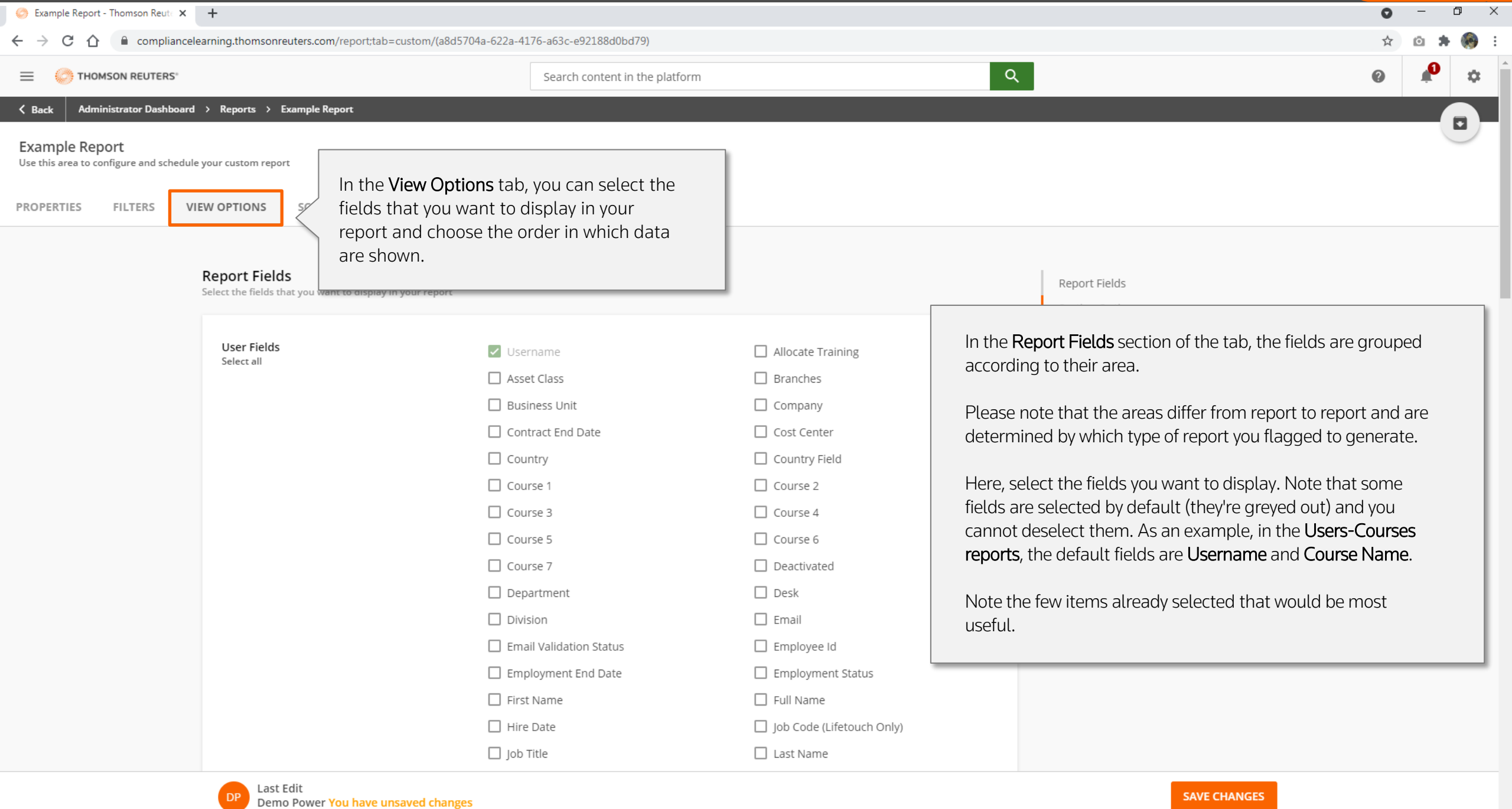
You can further filter to include individuals on courses within a specific enrollment date range.

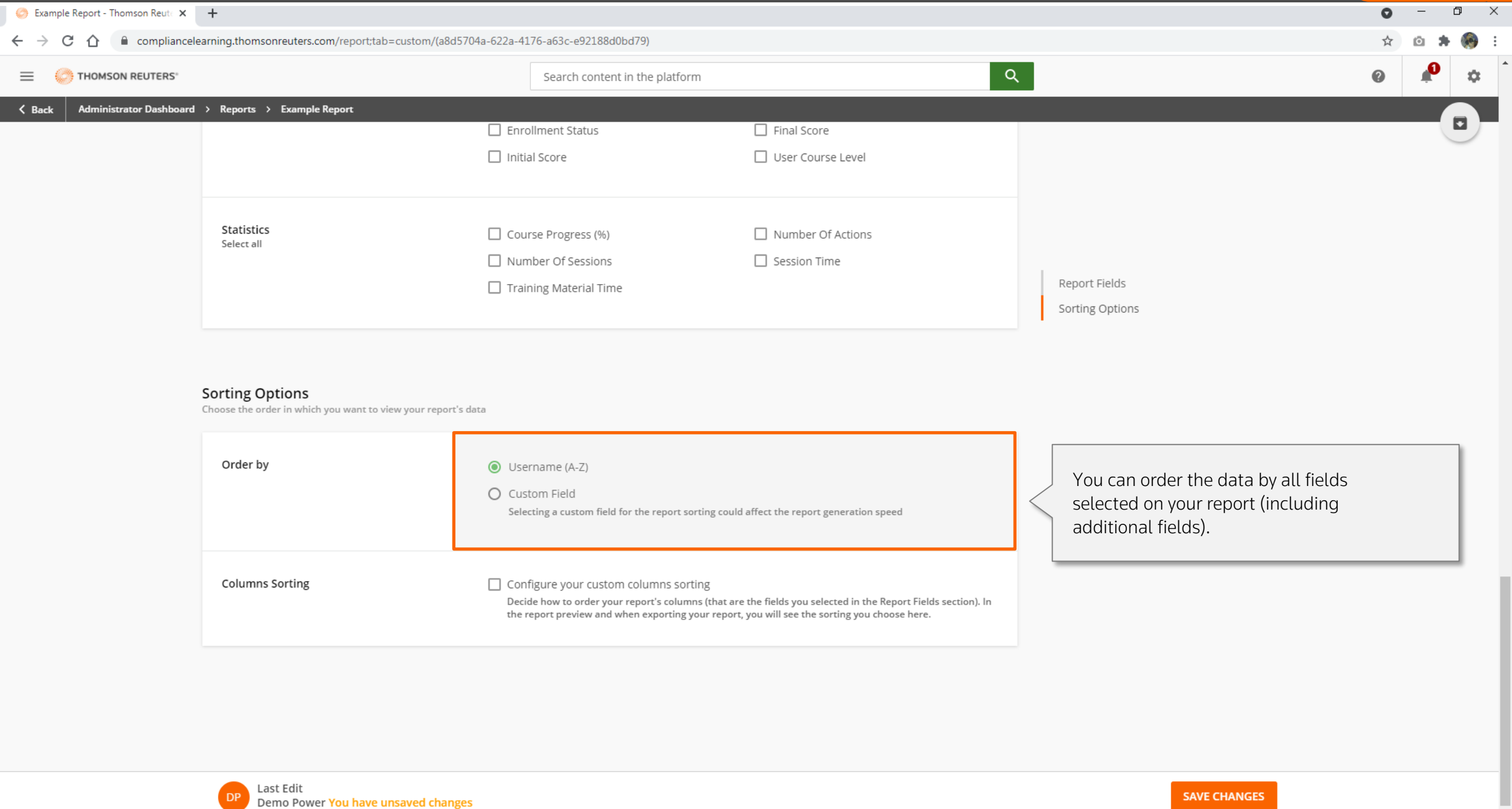
You can also report on only those who have completed by selecting the desired completion date.

The filters available are:

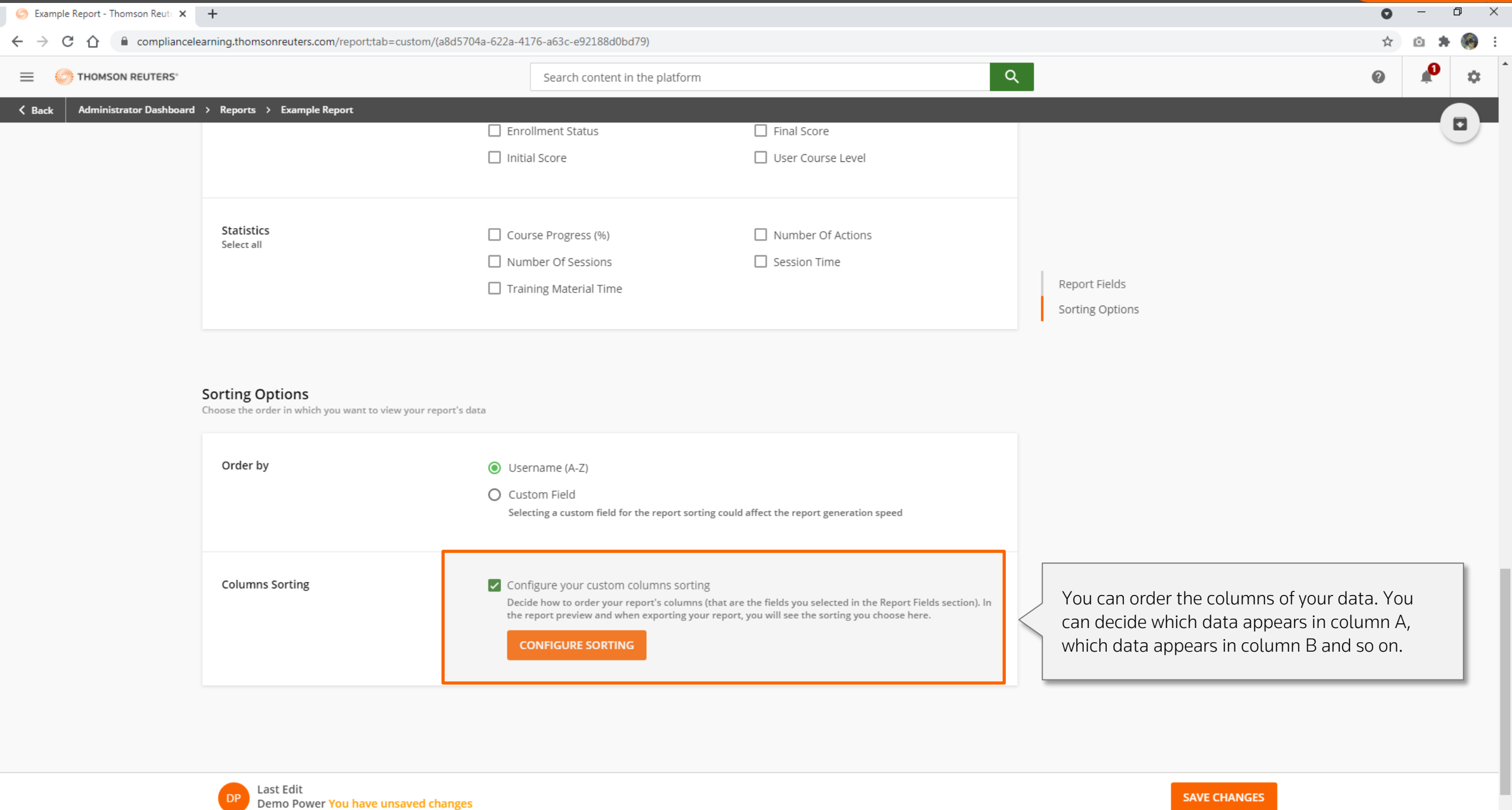
- Is before "x" days ago or an absolute date
- Is After "x" days or an absolute date
- Is in the range between two dates

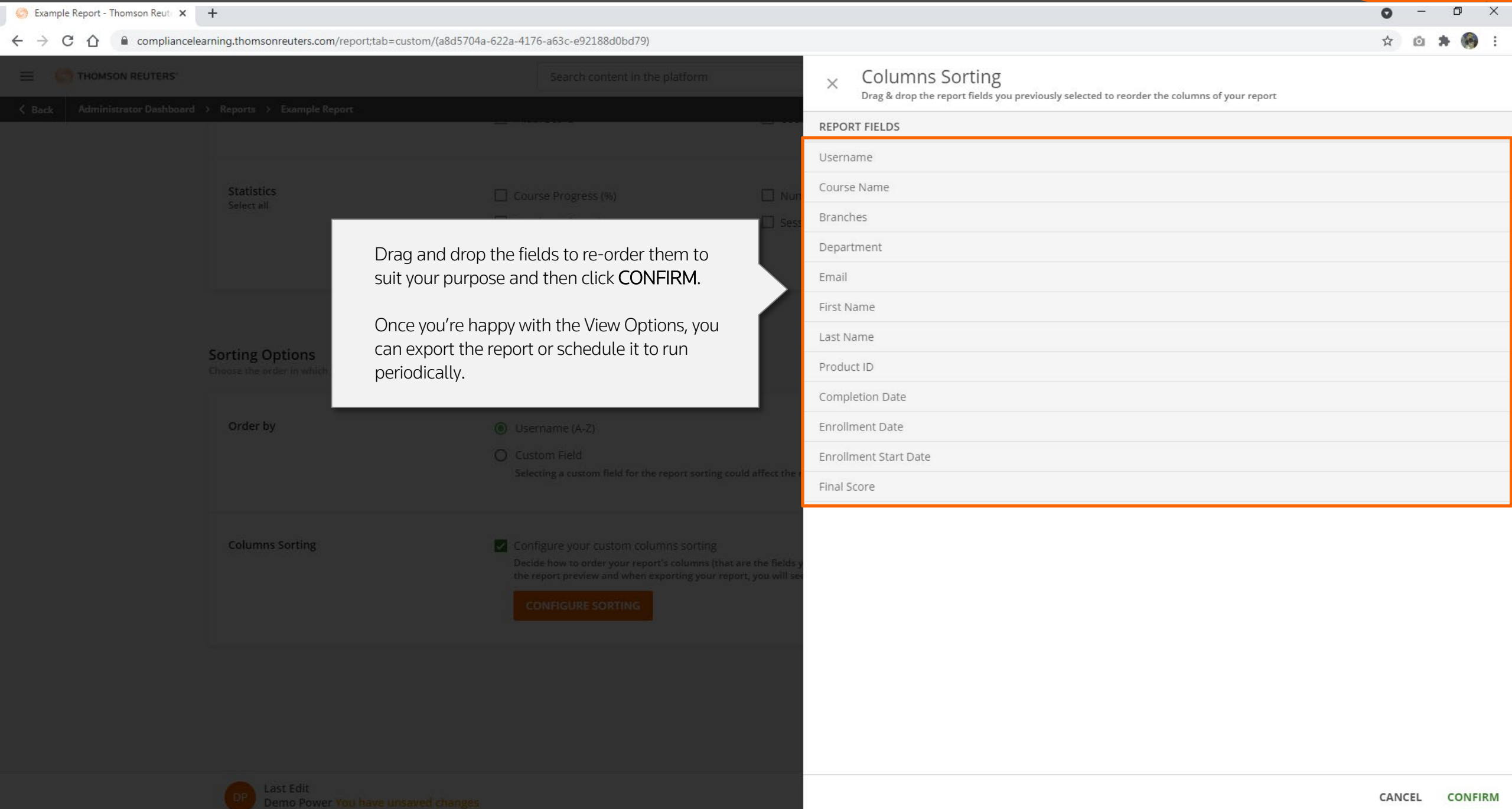

Example Report - Thomson Reute
compliancelearning.thomsonreuters.com/report/3db473a1-c0e5-4209-ae3d-6168f1777410;tab=properties
THOMSON REUTERS
Search content in the platform
Back
Administrator Dashboard
Reports
Example Report
Apply this report to all dates or select the dates that you want to include in your report
Enrollment Date
All Dates
Select Date
Completion Date
All Dates
Select Date
Users
Courses
Date Options
Enrollment
Enrollment
Select the enrollment statuses to which you want to apply the report
Course Enrollment Status
Completed
In Progress
Waiting Users
Suspended
Enrollments to confirm
Overbooking
Subscribed
You can also report selecting the desired completion status.
DP
Last Edit
Demo Power You have unsaved changes
SAVE CHANGES

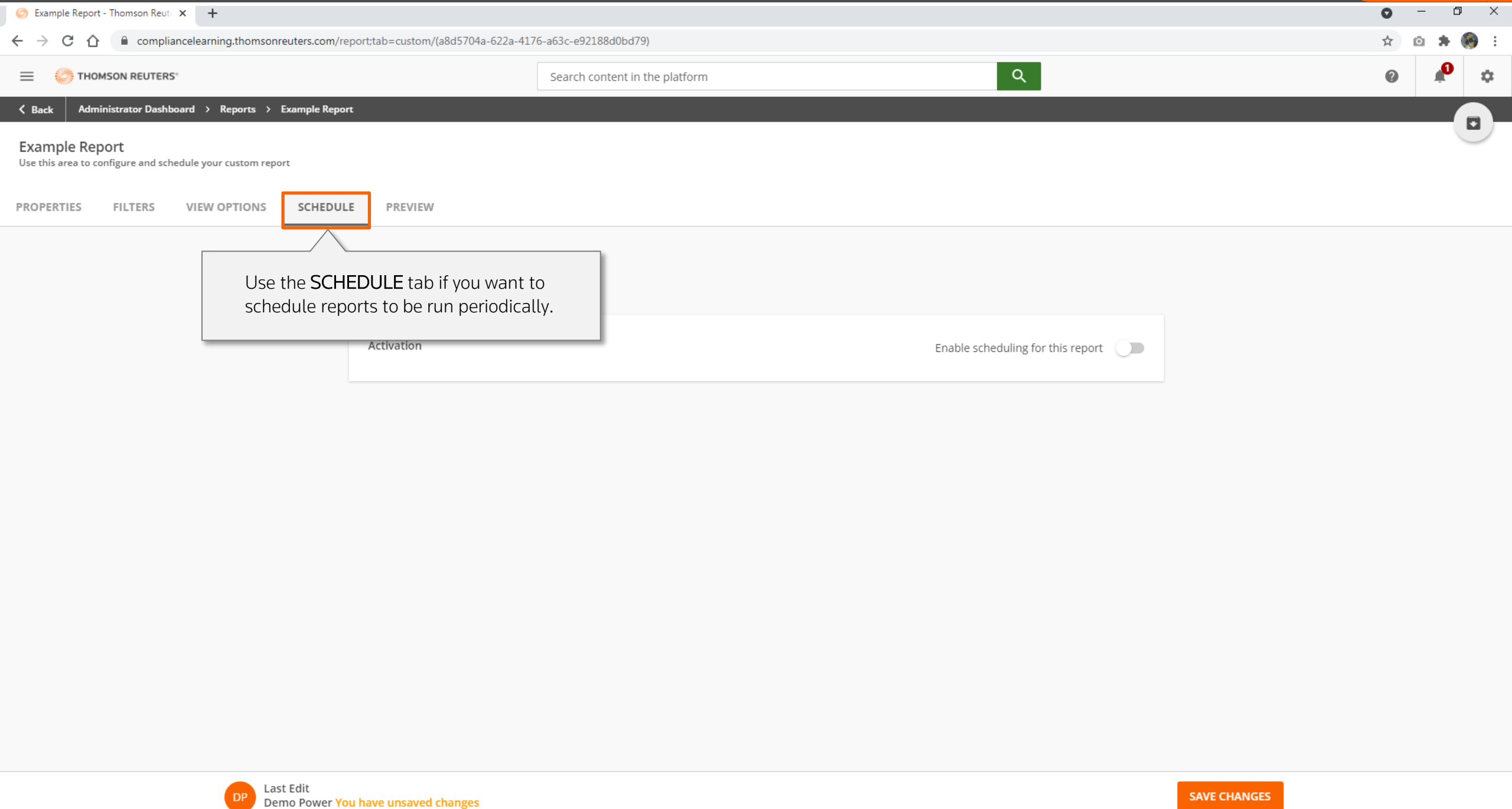

Example Report - Thomson Reut
compliancelearning.thomsonreuters.com/report;tab=custom/(a8d5704a-622a-4176-a63c-e92188d0bd79)
THOMSON REUTERS
Search content in the platform
Back
Administrator Dashboard
Reports
Example Report
Example Report
Use this area to configure and schedule your custom report
PROPERTIES
FILTERS
VIEW OPTIONS
In the View Options tab, you can select the fields that you want to display in your report and choose the order in which data are shown.
Report Fields
Select the fields that you want to display in your report
Report Fields
User Fields
Select all
Username
Asset Class
Business Unit
Contract End Date
Country
Course 1
Course 3
Course 5
Course 7
Department
Division
Email Validation Status
Employment End Date
First Name
Hire Date
Job Title
Allocate Training
Branches
Company
Cost Center
Country Field
Course 2
Course 4
Course 6
Deactivated
Desk
Email
Employee Id
Employment Status
Full Name
Job Code (Lifetouch Only)
Last Name
In the Report Fields section of the tab, the fields are grouped according to their area.
Please note that the areas differ from report to report and are determined by which type of report you flagged to generate.
Here, select the fields you want to display. Note that some fields are selected by default (they're greyed out) and you cannot deselect them. As an example, in the Users-Courses reports, the default fields are Username and Course Name.
Note the few items already selected that would be most useful.
DP
Last Edit
Demo Power You have unsaved changes
SAVE CHANGES

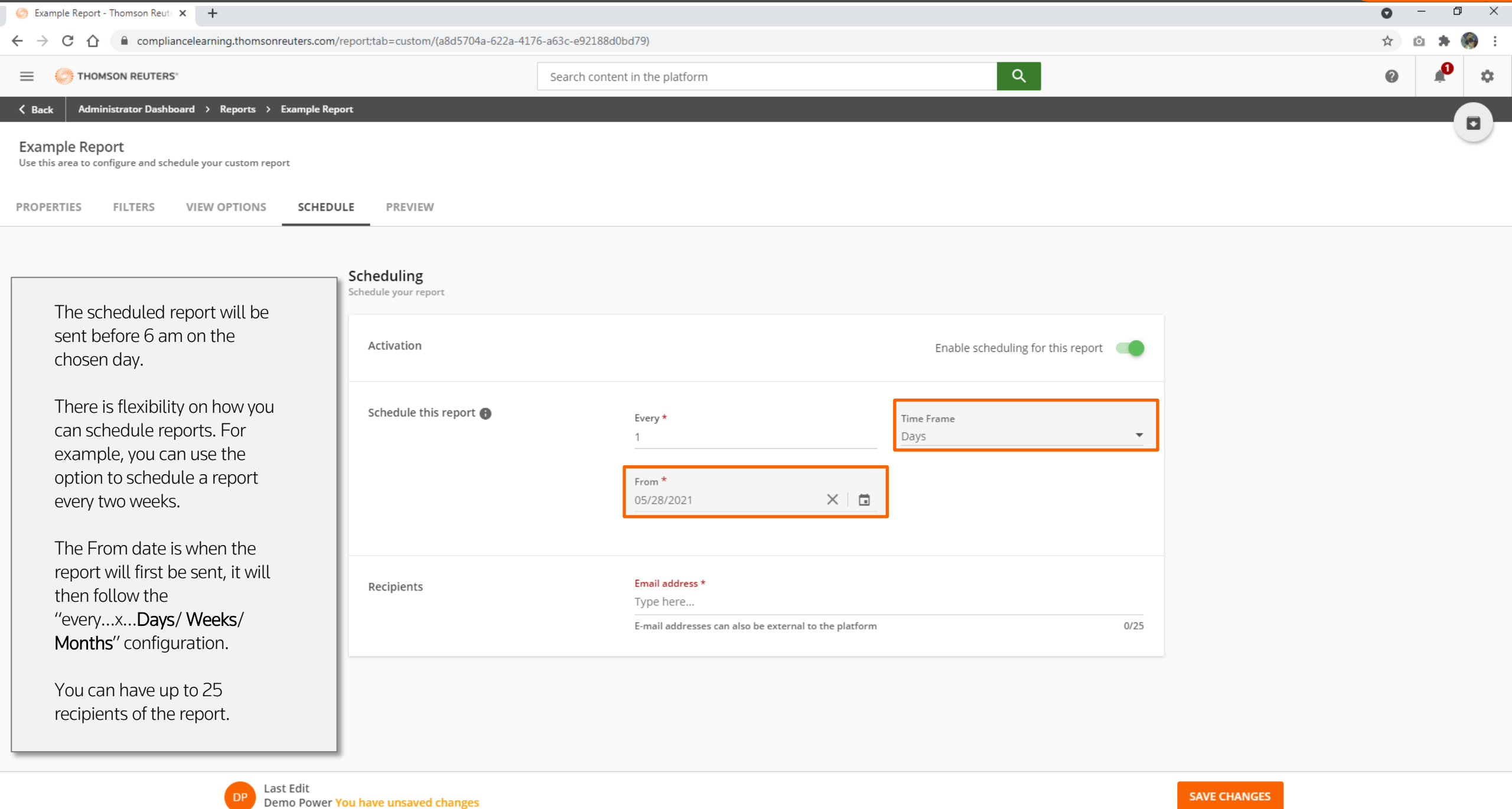


You can order the data by all fields selected on your report (including additional fields).


Example Report - Thomson Reut
compliancelearning.thomsonreuters.com/report;tab=custom/(a8d5704a-622a-4176-a63c-e92188d0bd79)
THOMSON REUTERS
Search content in the platform
Back
Administrator Dashboard
Reports
Example Report
Enrollment Status
Final Score
Initial Score
User Course Level
Statistics
Select all
Course Progress (%)
Number Of Actions
Number Of Sessions
Session Time
Training Material Time
Report Fields
Sorting Options
Sorting Options
Choose the order in which you want to view your report's data
Order by
Username (A-Z)
Custom Field
Selecting a custom field for the report sorting could affect the report generation speed
Columns Sorting
Configure your custom columns sorting
Decide how to order your report's columns (that are the fields you selected in the Report Fields section). In the report preview and when exporting your report, you will see the sorting you choose here.
CONFIGURE SORTING
You can order the columns of your data. You can decide which data appears in column A, which data appears in column B and so on.
DP
Last Edit
Demo Power You have unsaved changes
SAVE CHANGES


Example Report - Thomson Reut
compliancelearning.thomsonreuters.com/report;tab=custom/(a8d5704a-622a-4176-a63c-e92188d0bd79)
THOMSON REUTERS
Search content in the platform
Back
Administrator Dashboard
Reports
Example Report
Statistics
Select all
Course Progress (%)
Sorting Options
Order by
Username (A-Z)
Custom Field
Columns Sorting
Configure your custom columns sorting
CONFIGURE SORTING
Last Edit
Demo Power
You have unsaved changes
Drag and drop the fields to re-order them to suit your purpose and then click CONFIRM.
Once you're happy with the View Options, you can export the report or schedule it to run periodically.
Columns Sorting
Drag & drop the report fields you previously selected to reorder the columns of your report
REPORT FIELDS
Username
Course Name
Branches
Department
Email
First Name
Last Name
Product ID
Completion Date
Enrollment Date
Enrollment Start Date
Final Score
CANCEL
CONFIRM


Example Report - Thomson Reut
compliancelearning.thomsonreuters.com/report;tab=custom/(a8d5704a-622a-4176-a63c-e92188d0bd79)
THOMSON REUTERS
Search content in the platform
Back
Administrator Dashboard
Reports
Example Report
Example Report
Use this area to configure and schedule your custom report
PROPERTIES
FILTERS
VIEW OPTIONS
SCHEDULE
PREVIEW
Use the SCHEDULE tab if you want to schedule reports to be run periodically.
Activation
Enable scheduling for this report
DP
Last Edit
Demo Power You have unsaved changes
SAVE CHANGES

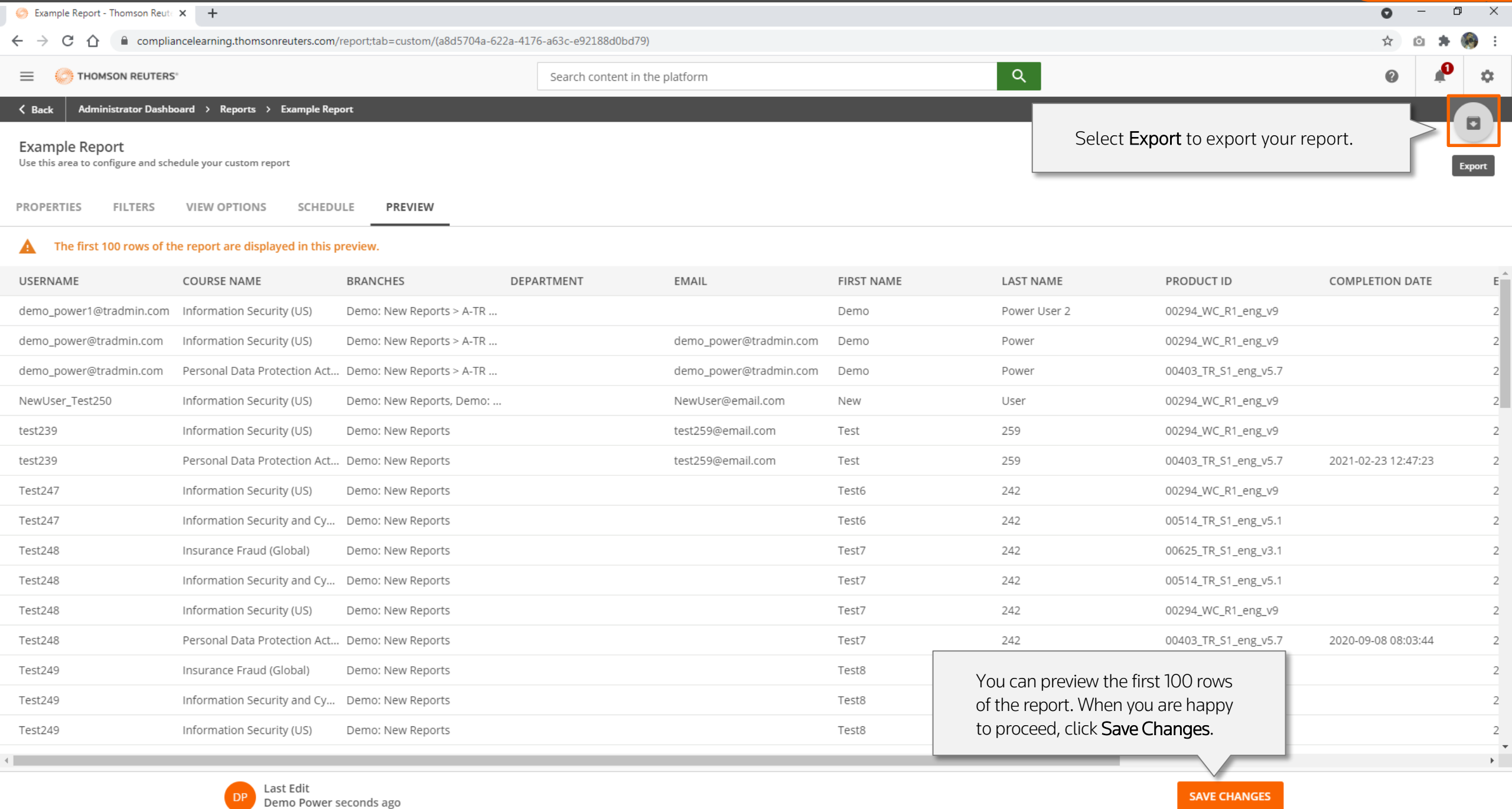


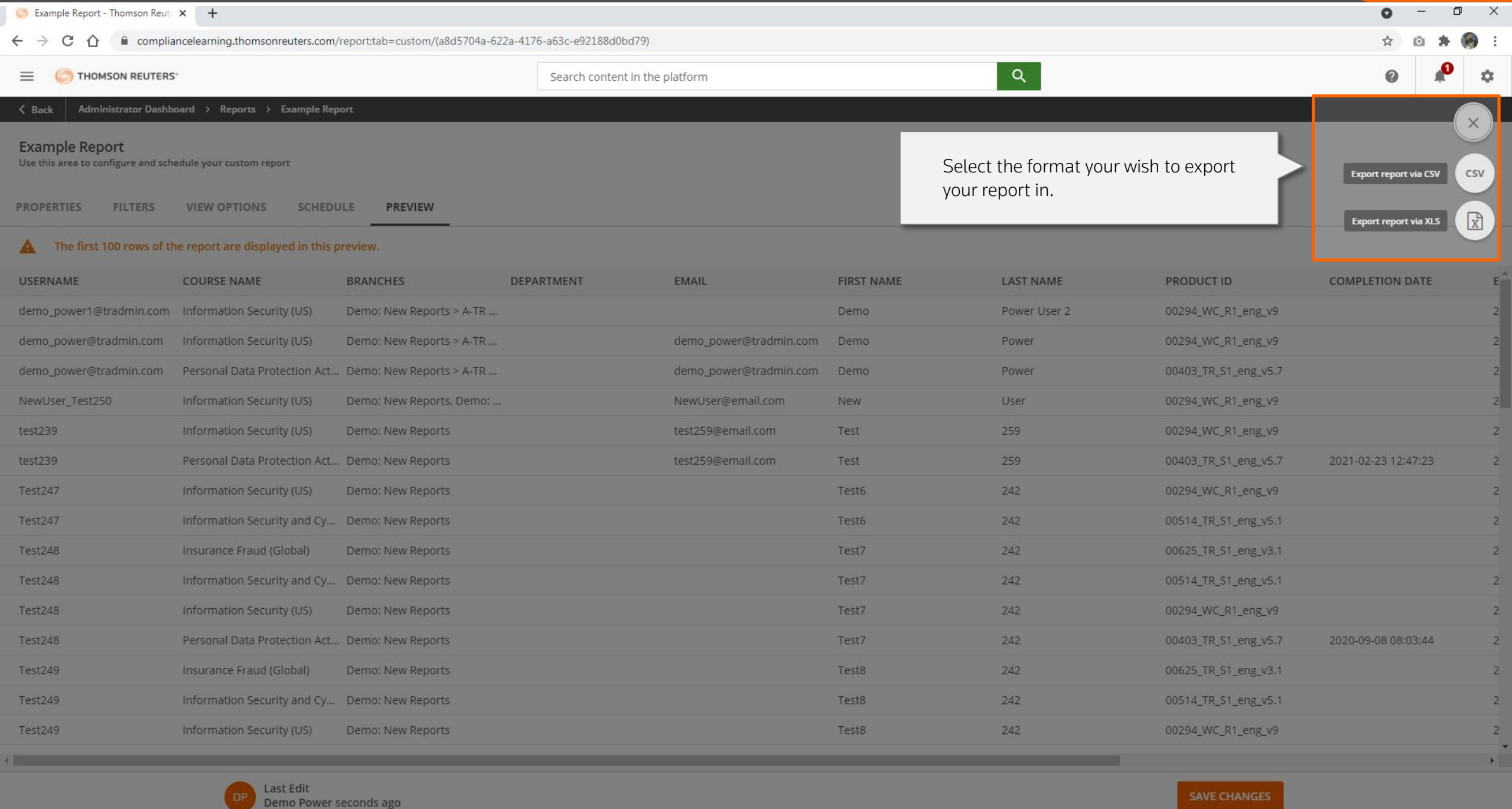
The scheduled report will be sent before 6 am on the chosen day.

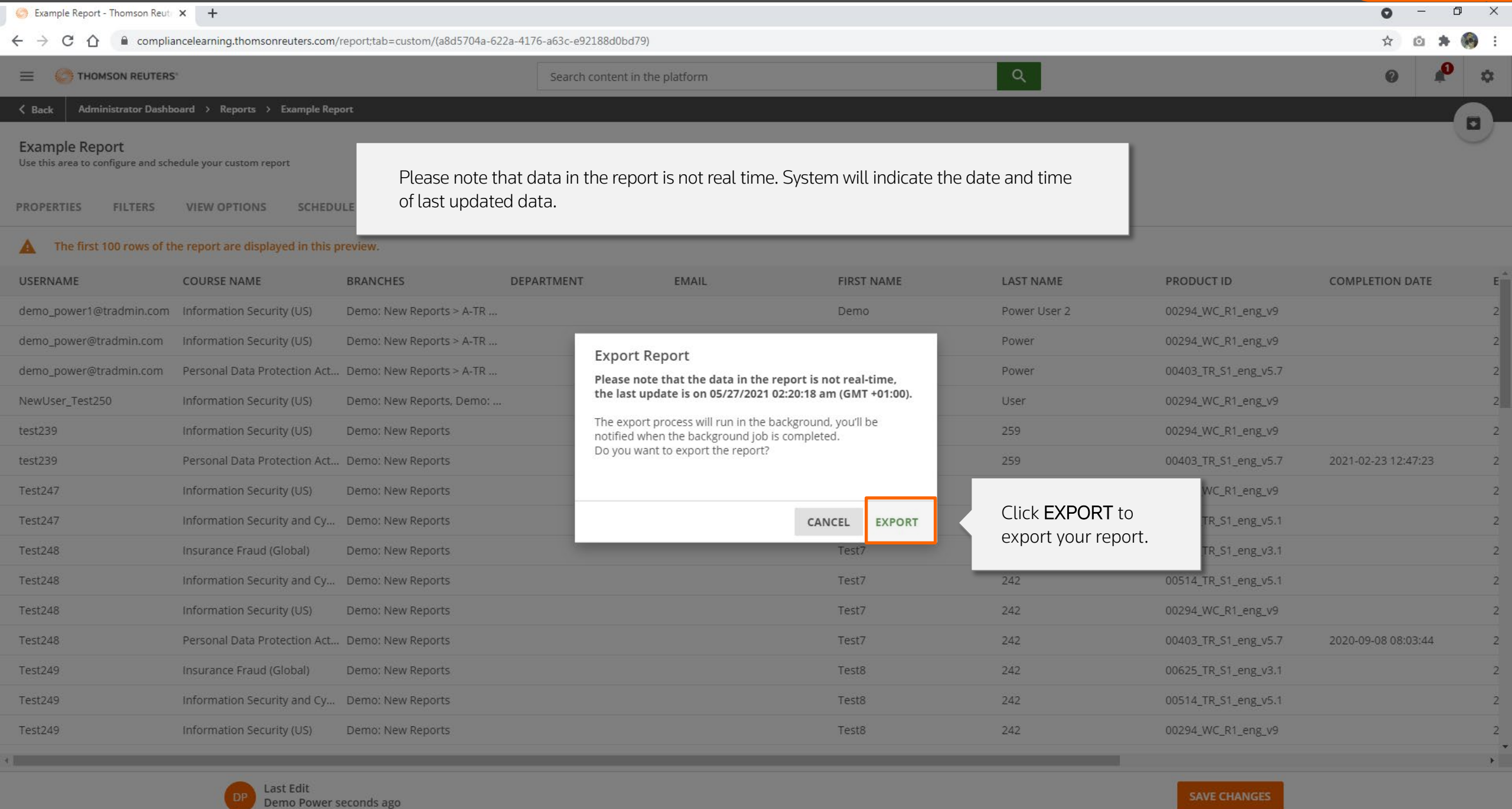
There is flexibility on how you can schedule reports. For example, you can use the option to schedule a report every two weeks.

The From date is when the report will first be sent, it will then follow the "every…x…**Days/ Weeks/ Months**" configuration.

You can have up to 25 recipients of the report.

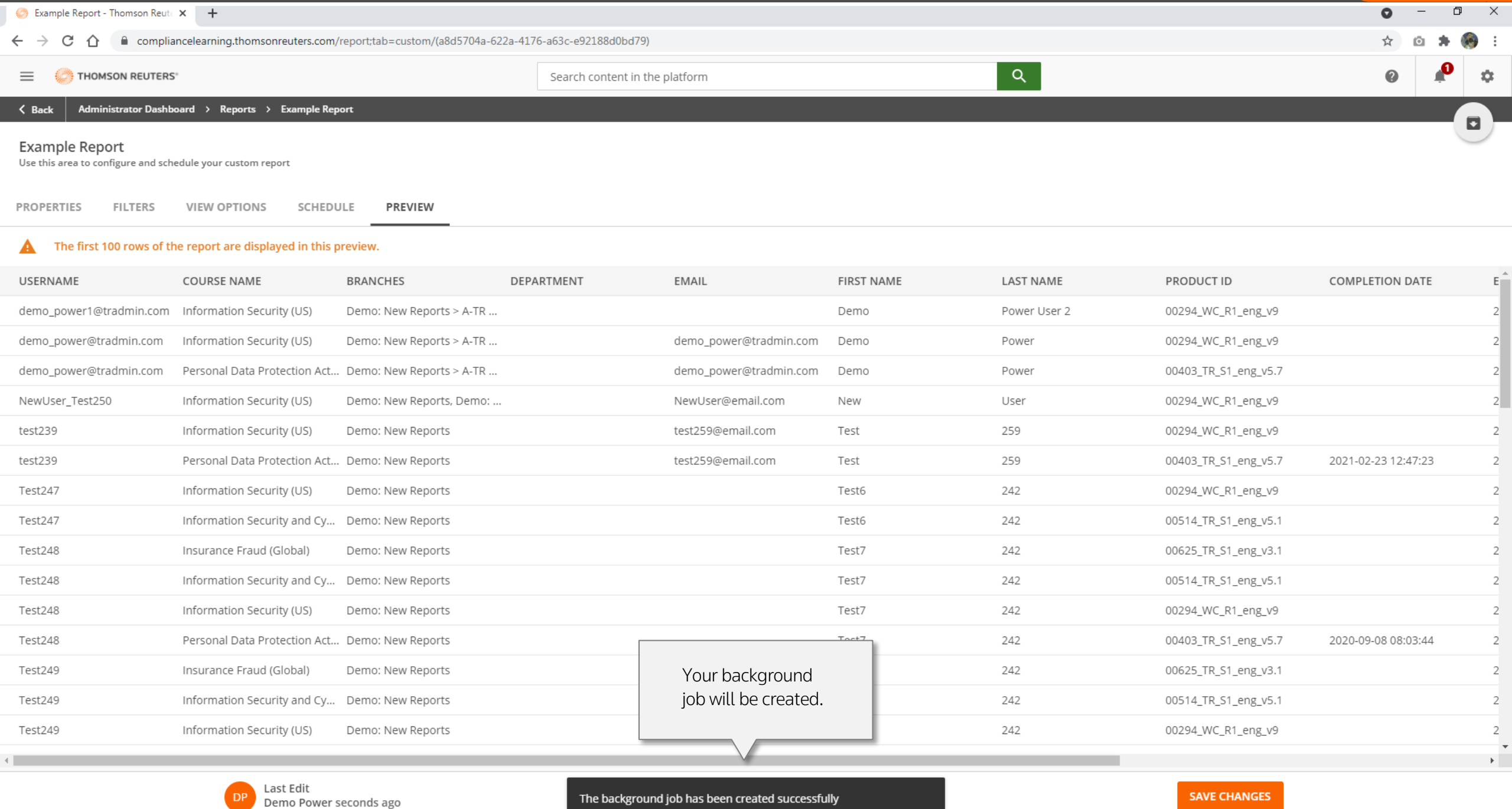

Example Report - Thomson Reut
compliancelearning.thomsonreuters.com/report;tab=custom/(a8d5704a-622a-4176-a63c-e92188d0bd79)
THOMSON REUTERS
Search content in the platform
Back
Administrator Dashboard > Reports > Example Report
Example Report
Use this area to configure and schedule your custom report
Select Export to export your report.
Export
PROPERTIES
FILTERS
VIEW OPTIONS
SCHEDULE
PREVIEW
The first 100 rows of the report are displayed in this preview.
USERNAME COURSE NAME BRANCHES DEPARTMENT EMAIL FIRST NAME LAST NAME PRODUCT ID COMPLETION DATE E
demo_power1@tradmin.com Information Security (US) Demo: New Reports > A-TR ... Demo Power User 2 00294_WC_R1_eng_v9 2
demo_power@tradmin.com Information Security (US) Demo: New Reports > A-TR ... demo_power@tradmin.com Demo Power 00294_WC_R1_eng_v9 2
demo_power@tradmin.com Personal Data Protection Act... Demo: New Reports > A-TR ... demo_power@tradmin.com Demo Power 00403_TR_S1_eng_v5.7 2
NewUser_Test250 Information Security (US) Demo: New Reports, Demo: ... NewUser@email.com New User 00294_WC_R1_eng_v9 2
test239 Information Security (US) Demo: New Reports test259@email.com Test 259 00294_WC_R1_eng_v9 2
test239 Personal Data Protection Act... Demo: New Reports test259@email.com Test 259 00403_TR_S1_eng_v5.7 2021-02-23 12:47:23 2
Test247 Information Security (US) Demo: New Reports Test6 242 00294_WC_R1_eng_v9 2
Test247 Information Security and Cy... Demo: New Reports Test6 242 00514_TR_S1_eng_v5.1 2
Test248 Insurance Fraud (Global) Demo: New Reports Test7 242 00625_TR_S1_eng_v3.1 2
Test248 Information Security and Cy... Demo: New Reports Test7 242 00514_TR_S1_eng_v5.1 2
Test248 Information Security (US) Demo: New Reports Test7 242 00294_WC_R1_eng_v9 2
Test248 Personal Data Protection Act... Demo: New Reports Test7 242 00403_TR_S1_eng_v5.7 2020-09-08 08:03:44 2
Test249 Insurance Fraud (Global) Demo: New Reports Test8 2
Test249 Information Security and Cy... Demo: New Reports Test8 2
Test249 Information Security (US) Demo: New Reports Test8 2
You can preview the first 100 rows of the report. When you are happy to proceed, click Save Changes.
DP
Last Edit
Demo Power seconds ago
SAVE CHANGES


Example Report - Thomson Reut
compliancelearning.thomsonreuters.com/report;tab=custom/(a8d5704a-622a-4176-a63c-e92188d0bd79)
THOMSON REUTERS
Search content in the platform
Back
Administrator Dashboard > Reports > Example Report
Example Report
Use this area to configure and schedule your custom report
PROPERTIES
FILTERS
VIEW OPTIONS
SCHEDULE
PREVIEW
The first 100 rows of the report are displayed in this preview.
Select the format your wish to export your report in.
Export report via CSV
CSV
Export report via XLS
USERNAME
COURSE NAME
BRANCHES
DEPARTMENT
EMAIL
FIRST NAME
LAST NAME
PRODUCT ID
COMPLETION DATE
demo_power1@tradmin.com Information Security (US) Demo: New Reports > A-TR ... Demo Power User 2 00294_WC_R1_eng_v9
demo_power@tradmin.com Information Security (US) Demo: New Reports > A-TR ... demo_power@tradmin.com Demo Power 00294_WC_R1_eng_v9
demo_power@tradmin.com Personal Data Protection Act... Demo: New Reports > A-TR ... demo_power@tradmin.com Demo Power 00403_TR_S1_eng_v5.7
NewUser_Test250 Information Security (US) Demo: New Reports, Demo: ... NewUser@email.com New User 00294_WC_R1_eng_v9
test239 Information Security (US) Demo: New Reports test259@email.com Test 259 00294_WC_R1_eng_v9
test239 Personal Data Protection Act... Demo: New Reports test259@email.com Test 259 00403_TR_S1_eng_v5.7 2021-02-23 12:47:23
Test247 Information Security (US) Demo: New Reports Test6 242 00294_WC_R1_eng_v9
Test247 Information Security and Cy... Demo: New Reports Test6 242 00514_TR_S1_eng_v5.1
Test248 Insurance Fraud (Global) Demo: New Reports Test7 242 00625_TR_S1_eng_v3.1
Test248 Information Security and Cy... Demo: New Reports Test7 242 00514_TR_S1_eng_v5.1
Test248 Information Security (US) Demo: New Reports Test7 242 00294_WC_R1_eng_v9
Test248 Personal Data Protection Act... Demo: New Reports Test7 242 00403_TR_S1_eng_v5.7 2020-09-08 08:03:44
Test249 Insurance Fraud (Global) Demo: New Reports Test8 242 00625_TR_S1_eng_v3.1
Test249 Information Security and Cy... Demo: New Reports Test8 242 00514_TR_S1_eng_v5.1
Test249 Information Security (US) Demo: New Reports Test8 242 00294_WC_R1_eng_v9
DP
Last Edit
Demo Power seconds ago
SAVE CHANGES



Please note that data in the report is not real time. System will indicate the date and time of last updated data.

Click **EXPORT** to export your report.


Example Report - Thomson Reut
compliancelearning.thomsonreuters.com/report;tab=custom/(a8d5704a-622a-4176-a63c-e92188d0bd79)
THOMSON REUTERS
Search content in the platform
Back
Administrator Dashboard
Reports
Example Report
Example Report
Use this area to configure and schedule your custom report
PROPERTIES
FILTERS
VIEW OPTIONS
SCHEDULE
PREVIEW
The first 100 rows of the report are displayed in this preview.
USERNAME COURSE NAME BRANCHES DEPARTMENT EMAIL FIRST NAME LAST NAME PRODUCT ID COMPLETION DATE E
demo_power1@tradmin.com Information Security (US) Demo: New Reports > A-TR ... Demo Power User 2 00294_WC_R1_eng_v9 2
demo_power@tradmin.com Information Security (US) Demo: New Reports > A-TR ... demo_power@tradmin.com Demo Power 00294_WC_R1_eng_v9 2
demo_power@tradmin.com Personal Data Protection Act... Demo: New Reports > A-TR ... demo_power@tradmin.com Demo Power 00403_TR_S1_eng_v5.7 2
NewUser_Test250 Information Security (US) Demo: New Reports, Demo: ... NewUser@email.com New User 00294_WC_R1_eng_v9 2
test239 Information Security (US) Demo: New Reports test259@email.com Test 259 00294_WC_R1_eng_v9 2
test239 Personal Data Protection Act... Demo: New Reports test259@email.com Test 259 00403_TR_S1_eng_v5.7 2021-02-23 12:47:23 2
Test247 Information Security (US) Demo: New Reports Test6 242 00294_WC_R1_eng_v9 2
Test247 Information Security and Cy... Demo: New Reports Test6 242 00514_TR_S1_eng_v5.1 2
Test248 Insurance Fraud (Global) Demo: New Reports Test7 242 00625_TR_S1_eng_v3.1 2
Test248 Information Security and Cy... Demo: New Reports Test7 242 00514_TR_S1_eng_v5.1 2
Test248 Information Security (US) Demo: New Reports Test7 242 00294_WC_R1_eng_v9 2
Test248 Personal Data Protection Act... Demo: New Reports 242 00403_TR_S1_eng_v5.7 2020-09-08 08:03:44 2
Test249 Insurance Fraud (Global) Demo: New Reports 242 00625_TR_S1_eng_v3.1 2
Test249 Information Security and Cy... Demo: New Reports 242 00514_TR_S1_eng_v5.1 2
Test249 Information Security (US) Demo: New Reports 242 00294_WC_R1_eng_v9 2
Your background job will be created.
DP
Last Edit
Demo Power seconds ago
The background job has been created successfully
SAVE CHANGES

Example Report - Thomson Reut

compliancelearning.thomsonreuters.com/report;tab=custom/(a8d5704a-622a-4176-a63c-e92188d0bd79)

THOMSON REUTERS

Search content in the platform

Back | Administrator Dashboard > Reports > Example Report

Example Report

Use this area to configure and schedule your custom report

PROPERTIES | FILTERS | VIEW OPTIONS | SCHEDULE | PREVIEW

The first 100 rows of the report are displayed in this preview.

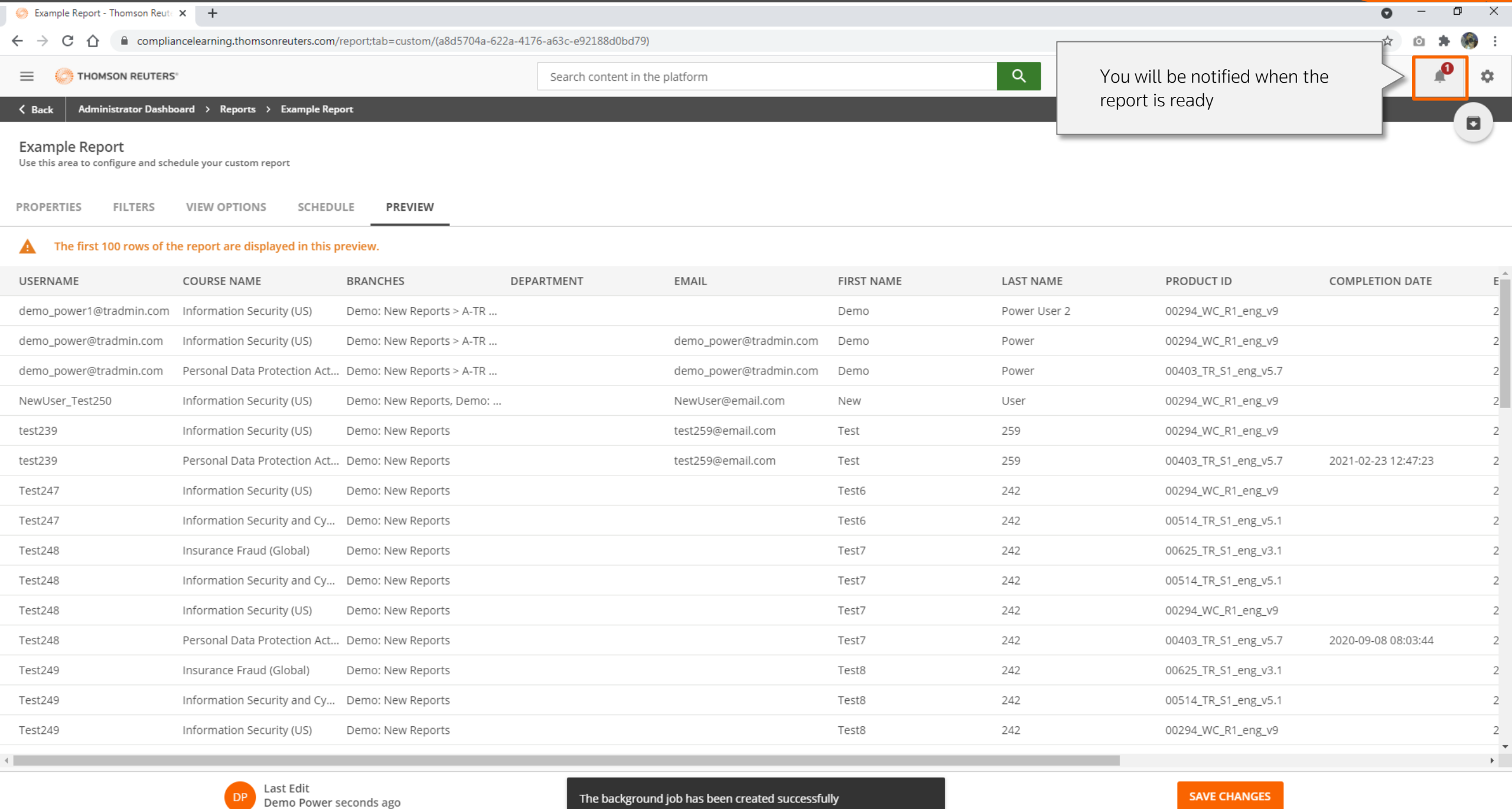
USERNAME	COURSE NAME	BRANCHES	DEPARTMENT	EMAIL	FIRST NAME	LAST NAME	PRODUCT ID	COMPLETION DATE	E
demo_power1@tradmin.com	Information Security (US)	Demo: New Reports > A-TR ...			Demo	Power User 2	00294_WC_R1_eng_v9		2
demo_power@tradmin.com	Information Security (US)	Demo: New Reports > A-TR ...		demo_power@tradmin.com	Demo	Power	00294_WC_R1_eng_v9		2
demo_power@tradmin.com	Personal Data Protection Act...	Demo: New Reports > A-TR ...		demo_power@tradmin.com	Demo	Power	00403_TR_S1_eng_v5.7		2
NewUser_Test250	Information Security (US)	Demo: New Reports, Demo: ...		NewUser@email.com	New	User	00294_WC_R1_eng_v9		2
test239	Information Security (US)	Demo: New Reports		test259@email.com	Test	259	00294_WC_R1_eng_v9		2
test239	Personal Data Protection Act...	Demo: New Reports		test259@email.com	Test	259	00403_TR_S1_eng_v5.7	2021-02-23 12:47:23	2
Test247	Information Security (US)	Demo: New Reports			Test6	242	00294_WC_R1_eng_v9		2
Test247	Information Security and Cy...	Demo: New Reports			Test6	242	00514_TR_S1_eng_v5.1		2
Test248	Insurance Fraud (Global)	Demo: New Reports			Test7	242	00625_TR_S1_eng_v3.1		2
Test248	Information Security and Cy...	Demo: New Reports			Test7	242	00514_TR_S1_eng_v5.1		2
Test248	Information Security (US)	Demo: New Reports			Test7	242	00294_WC_R1_eng_v9		2
Test248	Personal Data Protection Act...	Demo: New Reports			Test7	242	00403_TR_S1_eng_v5.7	2020-09-08 08:03:44	2
Test249	Insurance Fraud (Global)	Demo: New Reports				242	00625_TR_S1_eng_v3.1		2
Test249	Information Security and Cy...	Demo: New Reports				242	00514_TR_S1_eng_v5.1		2
Test249	Information Security (US)	Demo: New Reports				242	00294_WC_R1_eng_v9		2

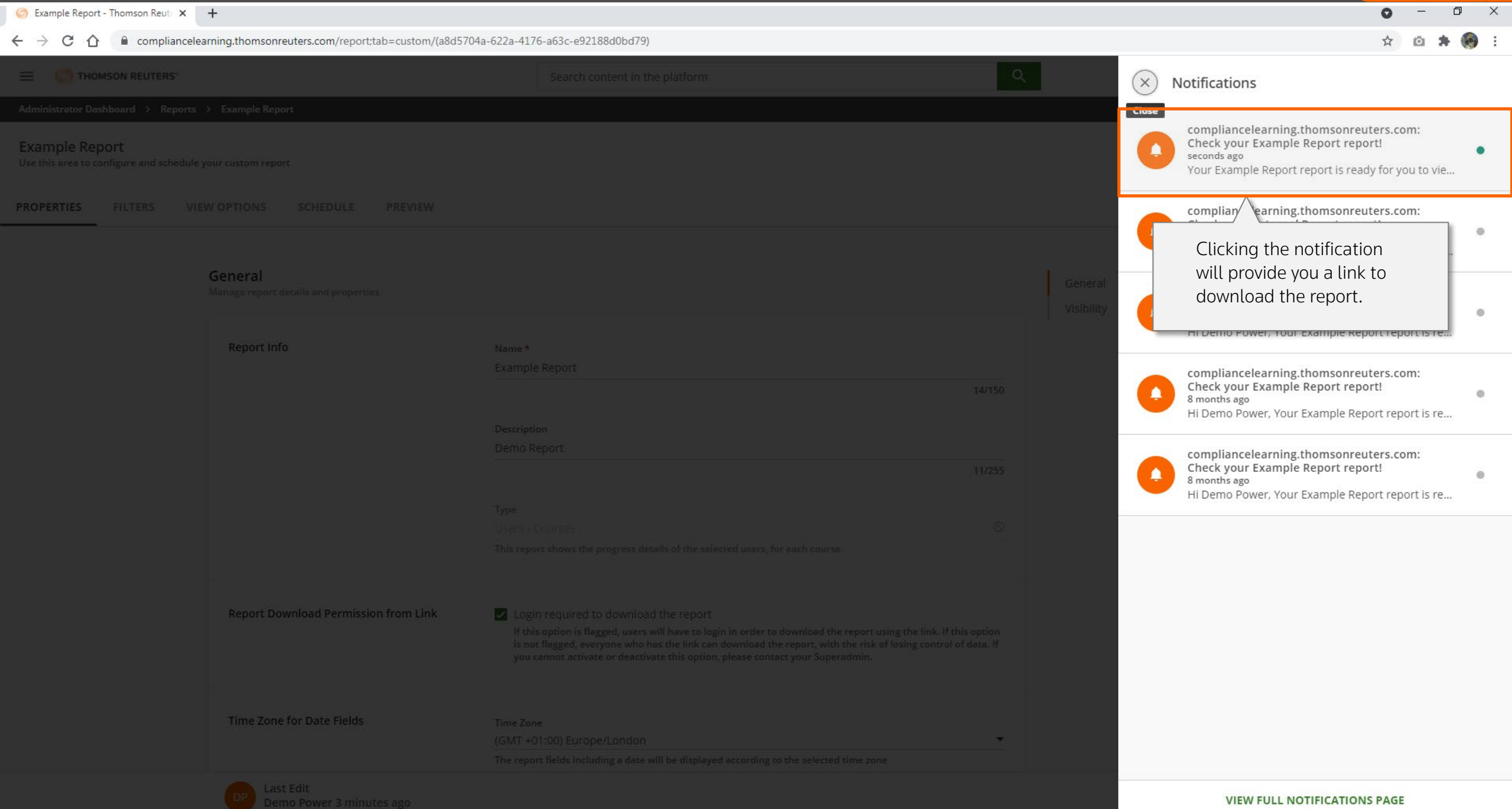
Your background job will be created.

DP Last Edit
Demo Power seconds ago

The background job has been created successfully

SAVE CHANGES


Example Report - Thomson Reut
compliancelearning.thomsonreuters.com/report;tab=custom/(a8d5704a-622a-4176-a63c-e92188d0bd79)
THOMSON REUTERS
Search content in the platform
You will be notified when the report is ready
Back
Administrator Dashboard > Reports > Example Report
Example Report
Use this area to configure and schedule your custom report
PROPERTIES
FILTERS
VIEW OPTIONS
SCHEDULE
PREVIEW
The first 100 rows of the report are displayed in this preview.
USERNAME COURSE NAME BRANCHES DEPARTMENT EMAIL FIRST NAME LAST NAME PRODUCT ID COMPLETION DATE E
demo_power1@tradmin.com Information Security (US) Demo: New Reports > A-TR ... Demo Power User 2 00294_WC_R1_eng_v9 2
demo_power@tradmin.com Information Security (US) Demo: New Reports > A-TR ... demo_power@tradmin.com Demo Power 00294_WC_R1_eng_v9 2
demo_power@tradmin.com Personal Data Protection Act... Demo: New Reports > A-TR ... demo_power@tradmin.com Demo Power 00403_TR_S1_eng_v5.7 2
NewUser_Test250 Information Security (US) Demo: New Reports, Demo: ... NewUser@email.com New User 00294_WC_R1_eng_v9 2
test239 Information Security (US) Demo: New Reports test259@email.com Test 259 00294_WC_R1_eng_v9 2
test239 Personal Data Protection Act... Demo: New Reports test259@email.com Test 259 00403_TR_S1_eng_v5.7 2021-02-23 12:47:23 2
Test247 Information Security (US) Demo: New Reports Test6 242 00294_WC_R1_eng_v9 2
Test247 Information Security and Cy... Demo: New Reports Test6 242 00514_TR_S1_eng_v5.1 2
Test248 Insurance Fraud (Global) Demo: New Reports Test7 242 00625_TR_S1_eng_v3.1 2
Test248 Information Security and Cy... Demo: New Reports Test7 242 00514_TR_S1_eng_v5.1 2
Test248 Information Security (US) Demo: New Reports Test7 242 00294_WC_R1_eng_v9 2
Test248 Personal Data Protection Act... Demo: New Reports Test7 242 00403_TR_S1_eng_v5.7 2020-09-08 08:03:44 2
Test249 Insurance Fraud (Global) Demo: New Reports Test8 242 00625_TR_S1_eng_v3.1 2
Test249 Information Security and Cy... Demo: New Reports Test8 242 00514_TR_S1_eng_v5.1 2
Test249 Information Security (US) Demo: New Reports Test8 242 00294_WC_R1_eng_v9 2
DP
Last Edit
Demo Power seconds ago
The background job has been created successfully
SAVE CHANGES


Example Report - Thomson Reut
compliancelearning.thomsonreuters.com/report;tab=custom/(a8d5704a-622a-4176-a63c-e92188d0bd79)
THOMSON REUTERS
Search content in the platform
Administrator Dashboard > Reports > Example Report
Example Report
Use this area to configure and schedule your custom report
PROPERTIES
FILTERS
VIEW OPTIONS
SCHEDULE
PREVIEW
General
Manage report details and properties
General
Visibility
Report Info
Name *
Example Report
14/150
Description
Demo Report
11/255
Type
This report shows the progress details of the selected users, for each course.
Report Download Permission from Link
Login required to download the report
If this option is flagged, users will have to login in order to download the report using the link. If this option is not flagged, everyone who has the link can download the report, with the risk of losing control of data. If you cannot activate or deactivate this option, please contact your Superadmin.
Time Zone for Date Fields
Time Zone
(GMT +01:00) Europe/London
The report fields including a date will be displayed according to the selected time zone
Last Edit
Demo Power 3 minutes ago
Notifications
Close
compliancelearning.thomsonreuters.com:
Check your Example Report report!
seconds ago
Your Example Report report is ready for you to vie...
Clicking the notification will provide you a link to download the report.
compliancelearning.thomsonreuters.com:
Check your Example Report report!
8 months ago
Hi Demo Power, Your Example Report report is re...
compliancelearning.thomsonreuters.com:
Check your Example Report report!
8 months ago
Hi Demo Power, Your Example Report report is re...
VIEW FULL NOTIFICATIONS PAGE

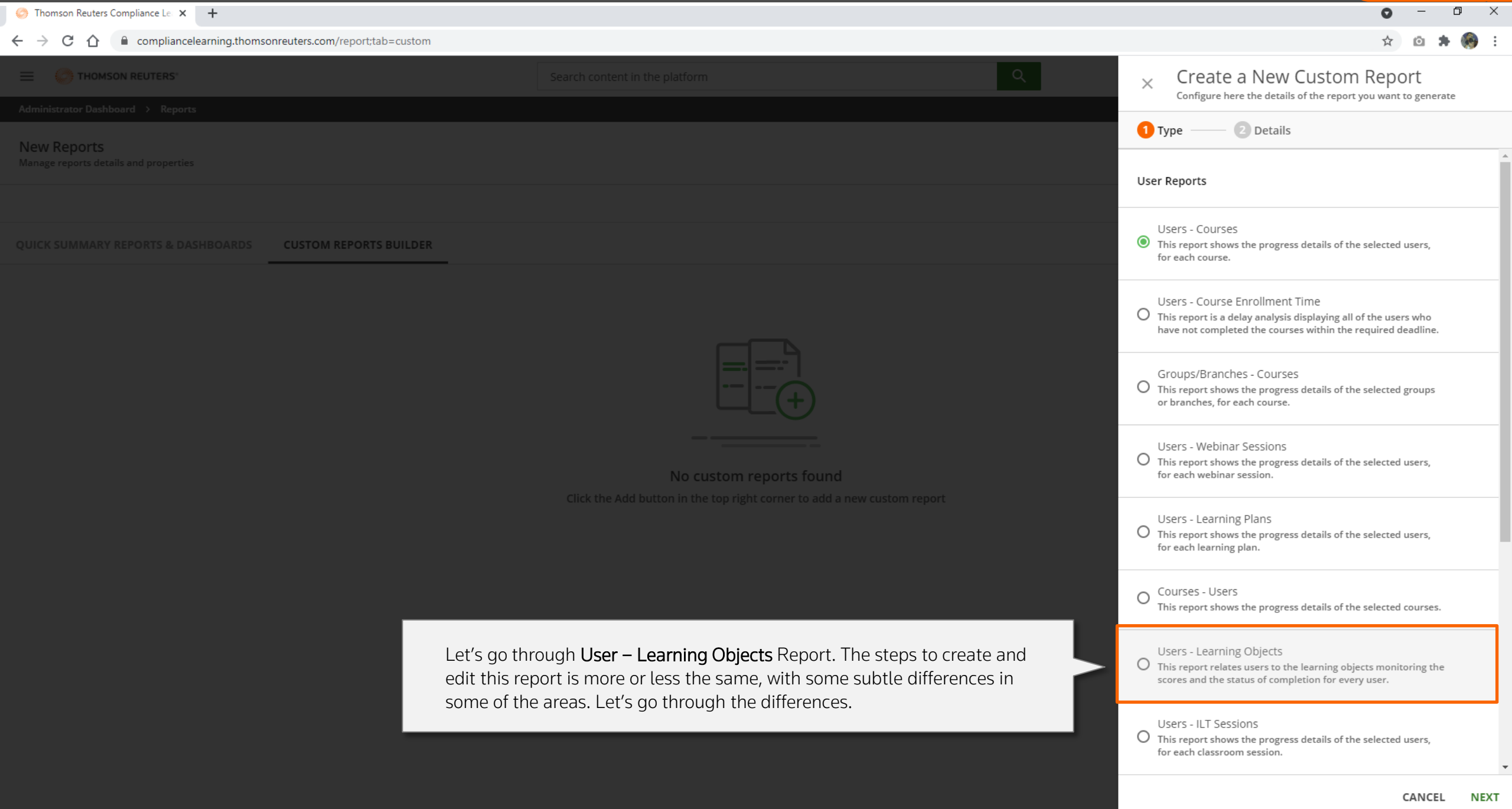
following is an example report of users enrolled in multiple courses. Let's decode this report.

1. The username will appear in the **Username** column. Since some users are enrolled in multiple courses their name will appear adjacent to the courses they are enrolled in.
2. The **Course Name** column will contain the course title.
3. You can view the Learner's branch in **Branches** column
4. The status of learners if they have progressed in the courses and completed can be seen in **Course Enrollment Status** column
5. The **Final Score** column will show the score user has achieved in assessment

1 User Name	2 Course Name	3 Branches	Email	First Name	Last Name	Product ID	Completion Date	Enrolment Date	4 Course Enrolment Status	5 Final Score
demo_power1@tradmin.com	Information Security (US)	Demo: New Reports > A-TR ...	demo_power1@tradmin.com	Demo	Power User	00294_WC_R1_eng_v9		23-02-2021 12:47	In Progress	40
demo_power@tradmin.com	Information Security (US)	Demo: New Reports > A-TR ...	demo_power@tradmin.com	Demo	Power	00294_WC_R1_eng_v9		23-02-2021 12:47	In Progress	
demo_power@tradmin.com	Personal Data Protection Act...	Demo: New Reports > A-TR ...	demo_power@tradmin.com	Demo	Power	00403_TR_S1_eng_v5.7		23-02-2021 12:47	Subscribed	
NewUser_Test250	Information Security (US)	Demo: New Reports, Demo: ...	NewUser@email.com	New	User	00294_WC_R1_eng_v9		23-02-2021 12:47	Subscribed	
test239	Information Security (US)	Demo: New Reports	test239@email.com	test239	User239	00294_WC_R1_eng_v9		23-02-2021 12:47	Subscribed	
test239	Personal Data Protection Act...	Demo: New Reports	test239@email.com	test239	User239	00403_TR_S1_eng_v5.7	23-02-2021 12:47	23-02-2021 12:47	Completed	100
Test247	Information Security (US)	Demo: New Reports	Test247@email.com	Test247	User247	00294_WC_R1_eng_v9		23-02-2021 12:47	In Progress	70
Test247	Information Security and Cy...	Demo: New Reports	Test247@email.com	Test247	User247	00514_TR_S1_eng_v5.1		23-02-2021 12:47	Subscribed	
Test248	Insurance Fraud (Global)	Demo: New Reports	Test248@email.com	Test248	User248	00625_TR_S1_eng_v3.1		23-02-2021 12:47	Subscribed	
Test248	Information Security and Cy...	Demo: New Reports	Test248@email.com	Test248	User248	00514_TR_S1_eng_v5.1		23-02-2021 12:47	Subscribed	
Test248	Information Security (US)	Demo: New Reports	Test248@email.com	Test248	User248	00294_WC_R1_eng_v9		23-02-2021 12:47	In Progress	
Test248	Personal Data Protection Act...	Demo: New Reports	Test248@email.com	Test248	User248	00403_TR_S1_eng_v5.7	08-09-2020 08:03	23-02-2021 12:47	Completed	90
Test249	Insurance Fraud (Global)	Demo: New Reports	Test249@email.com	Test249	User249	00625_TR_S1_eng_v3.1		23-02-2021 12:47	Subscribed	
Test249	Information Security and Cy...	Demo: New Reports	Test249@email.com	Test249	User249	00514_TR_S1_eng_v5.1		23-02-2021 12:47	In Progress	
Test249	Information Security (US)	Demo: New Reports	Test249@email.com	Test249	User249	00294_WC_R1_eng_v9		23-02-2021 12:47	In Progress	

Users – Learning Objects report (1)

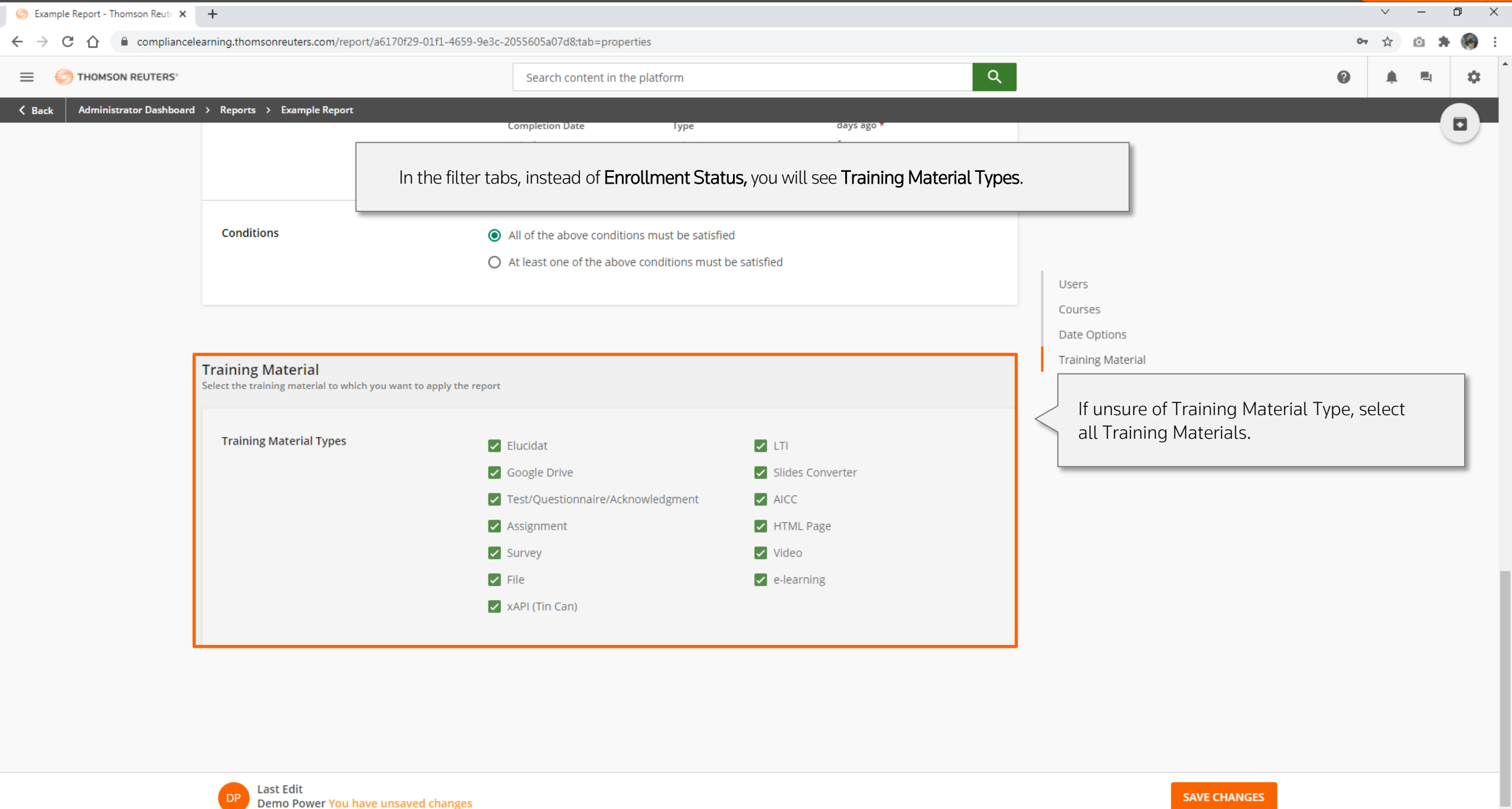
Return to Menu

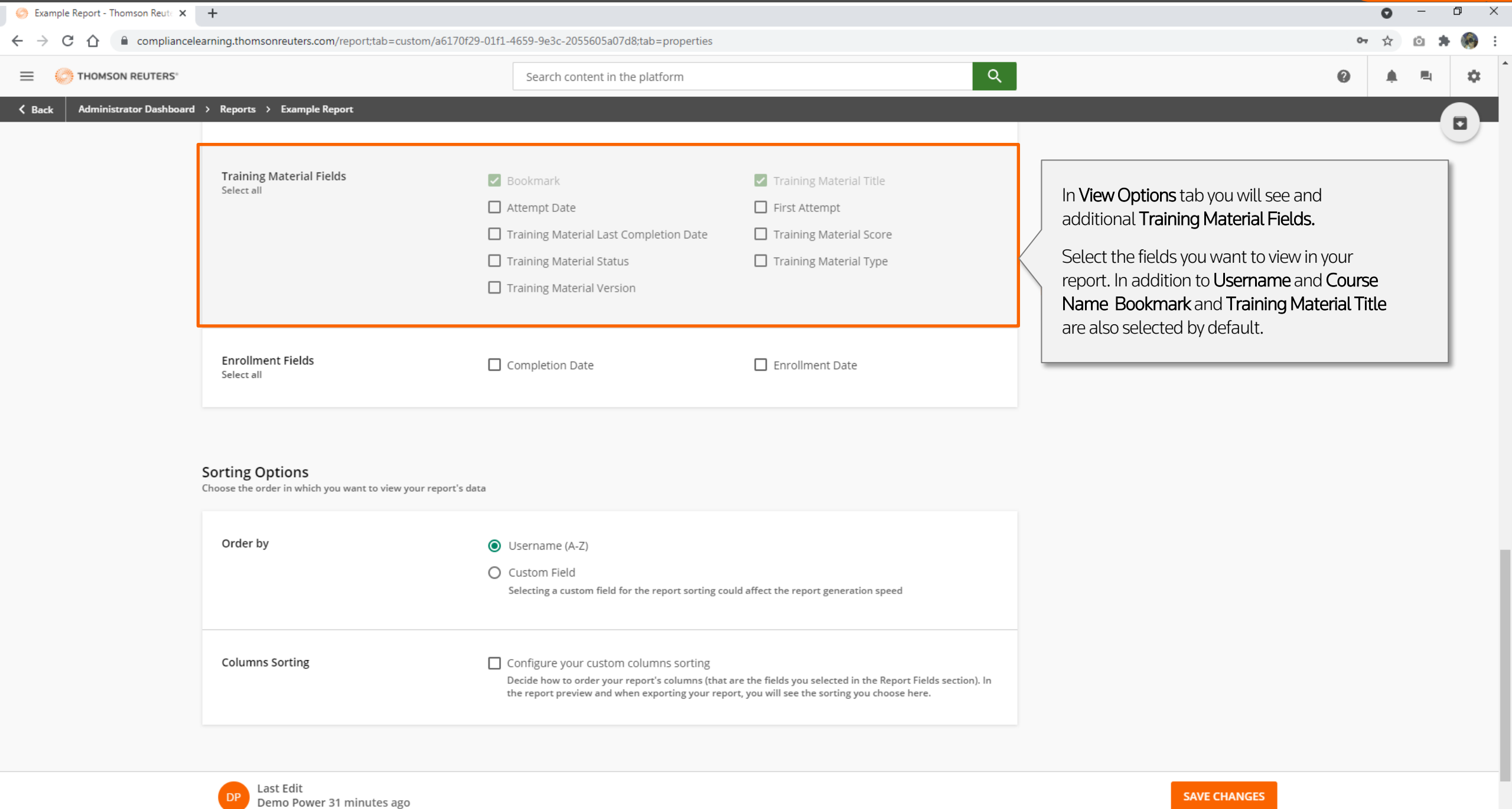


Let's go through **User – Learning Objects** Report. The steps to create and edit this report is more or less the same, with some subtle differences in some of the areas. Let's go through the differences.

Users – Learning Objects report (2)

Return to Menu





In **View Options** tab you will see and additional **Training Material Fields.**

Select the fields you want to view in your report. In addition to **Username** and **Course Name Bookmark** and **Training Material Title** are also selected by default.

The following is an example report of a course which consists of 4 modules, of which 3 are scored and 1 is a non-scored survey. Let's decode this report.

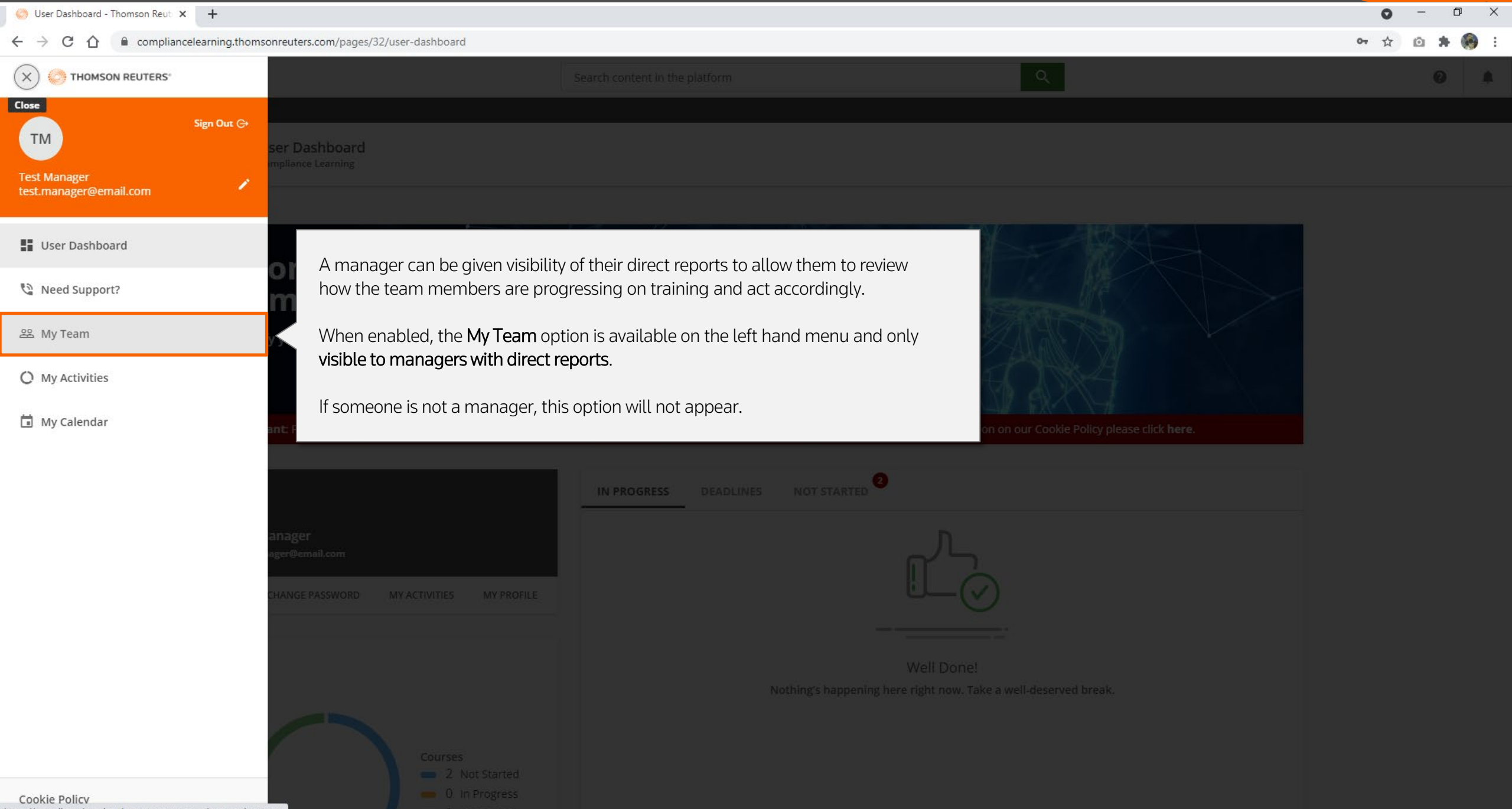
1. The username will appear in the **Username** column. Since there are 4 modules in this course the username will appear against each module.
2. The **Title** column will contain the title of modules.
3. The **Status** column will show whether the learner has completed a module or not.
4. The **Score** column will show the score against each module, if the module has scoring elements, like end of assessment or scored quizzes.

1 Username	First name	Course Name	2 Title	3 Status	Attempt Date	Training Material L	4 Score	Completion Date
demo_power@tradmin.com	Demo	Preventing Discrimination and Harass	Preventing Discrimination and Harassment US Fundamentals	Completed	10/1/2021 12:41	10/1/2021 12:41	90	10/1/2021 12:43
demo_power@tradmin.com	Demo	Preventing Discrimination and Harass	Preventing Discrimination and Harassment US: Managers	Completed	10/1/2021 12:42	10/1/2021 12:42	100	10/1/2021 12:43
demo_power@tradmin.com	Demo	Preventing Discrimination and Harass	Preventing Discrimination and Harassment: New York	Completed	10/1/2021 12:43	10/1/2021 12:43	80	10/1/2021 12:43
demo_power@tradmin.com	Demo	Preventing Discrimination and Harass	User Experience Survey	Completed	10/1/2021 1:15	10/1/2021 1:15		10/1/2021 12:43
User 12@yourcompany.com	User12	Preventing Discrimination and Harass	Preventing Discrimination and Harassment US Fundamentals	Completed	10/1/2021 12:30	10/1/2021 12:30	90	10/1/2021 12:31
User 12@yourcompany.com	User12	Preventing Discrimination and Harass	Preventing Discrimination and Harassment US: Managers	Completed	10/1/2021 12:30	10/1/2021 12:30	90	10/1/2021 12:31
User 12@yourcompany.com	User12	Preventing Discrimination and Harass	Preventing Discrimination and Harassment: New York	Completed	10/1/2021 12:31	10/1/2021 12:31	100	10/1/2021 12:31
User 12@yourcompany.com	User12	Preventing Discrimination and Harass	User Experience Survey	Not Started				10/1/2021 12:31
User 13@yourcompany.com	User13	Preventing Discrimination and Harass	Preventing Discrimination and Harassment US Fundamentals	Completed	10/1/2021 12:34	10/1/2021 12:34	100	10/1/2021 12:35
User 13@yourcompany.com	User13	Preventing Discrimination and Harass	Preventing Discrimination and Harassment US: Managers	Completed	10/1/2021 12:35	10/1/2021 12:35	80	10/1/2021 12:35
User 13@yourcompany.com	User13	Preventing Discrimination and Harass	Preventing Discrimination and Harassment: New York	Completed	10/1/2021 12:35	10/1/2021 12:35	80	10/1/2021 12:35
User 13@yourcompany.com	User13	Preventing Discrimination and Harass	User Experience Survey	Not Started				10/1/2021 12:35
User 14@yourcompany.com	User14	Preventing Discrimination and Harass	Preventing Discrimination and Harassment US Fundamentals	Completed	10/1/2021 12:44	10/1/2021 12:44	100	
User 14@yourcompany.com	User14	Preventing Discrimination and Harass	Preventing Discrimination and Harassment US: Managers	Completed	10/1/2021 12:44	10/1/2021 12:44	80	
User 14@yourcompany.com	User14	Preventing Discrimination and Harass	Preventing Discrimination and Harassment: New York	Failed	10/1/2021 12:45		60	
User 14@yourcompany.com	User14	Preventing Discrimination and Harass	User Experience Survey	Not Started				
User 15@yourcompany.com	User15	Preventing Discrimination and Harass	Preventing Discrimination and Harassment US Fundamentals	Not Started				
User 15@yourcompany.com	User15	Preventing Discrimination and Harass	Preventing Discrimination and Harassment US: Managers	Not Started				
User 15@yourcompany.com	User15	Preventing Discrimination and Harass	Preventing Discrimination and Harassment: New York	Not Started				
User 15@yourcompany.com	User15	Preventing Discrimination and Harass	User Experience Survey	Not Started				

My Team Management

My Team Overview (1)

Return to Menu



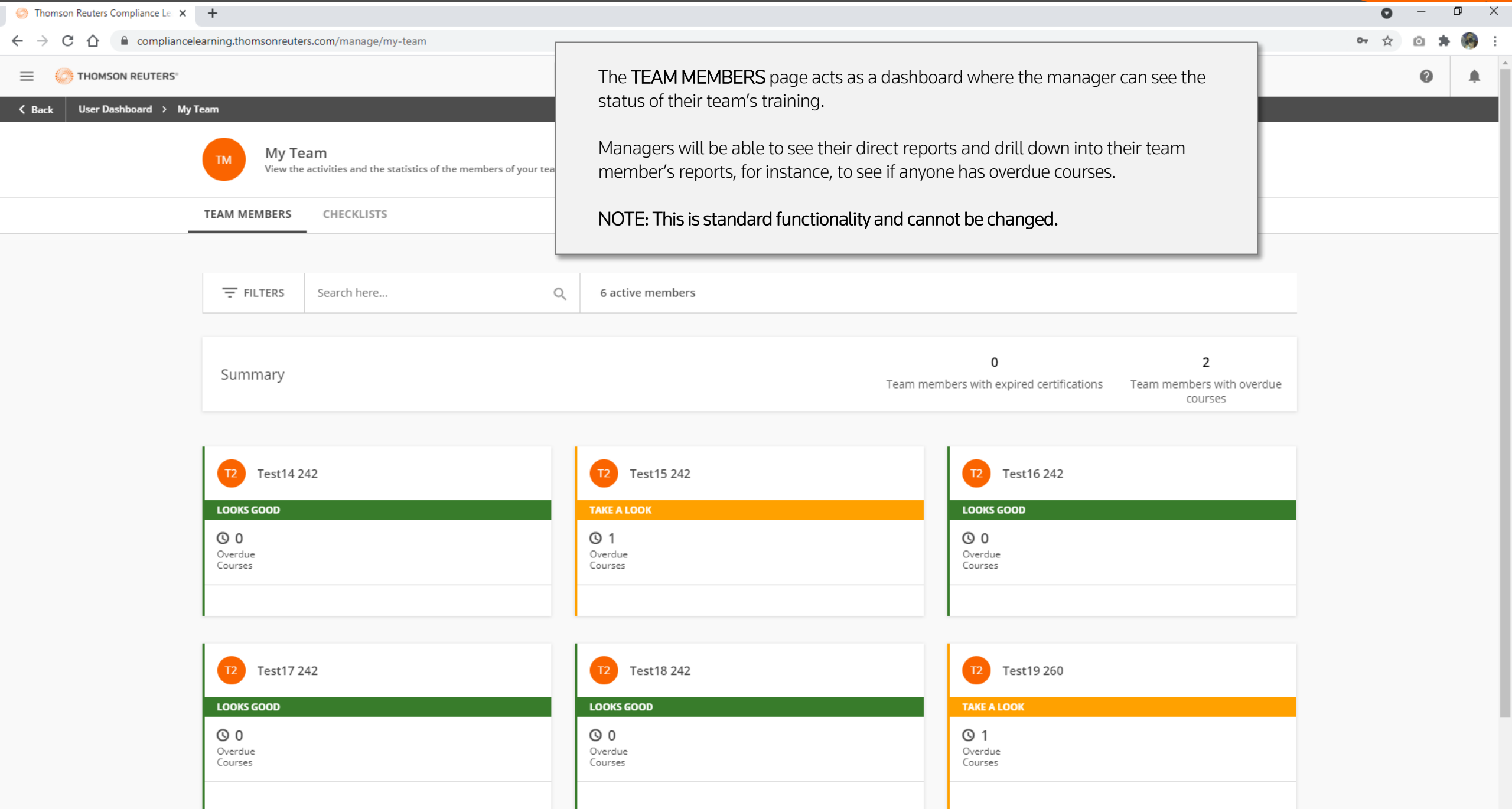
A manager can be given visibility of their direct reports to allow them to review how the team members are progressing on training and act accordingly.

When enabled, the **My Team** option is available on the left hand menu and only **visible to managers with direct reports**.

If someone is not a manager, this option will not appear.

My Team Overview (2)

Return to Menu



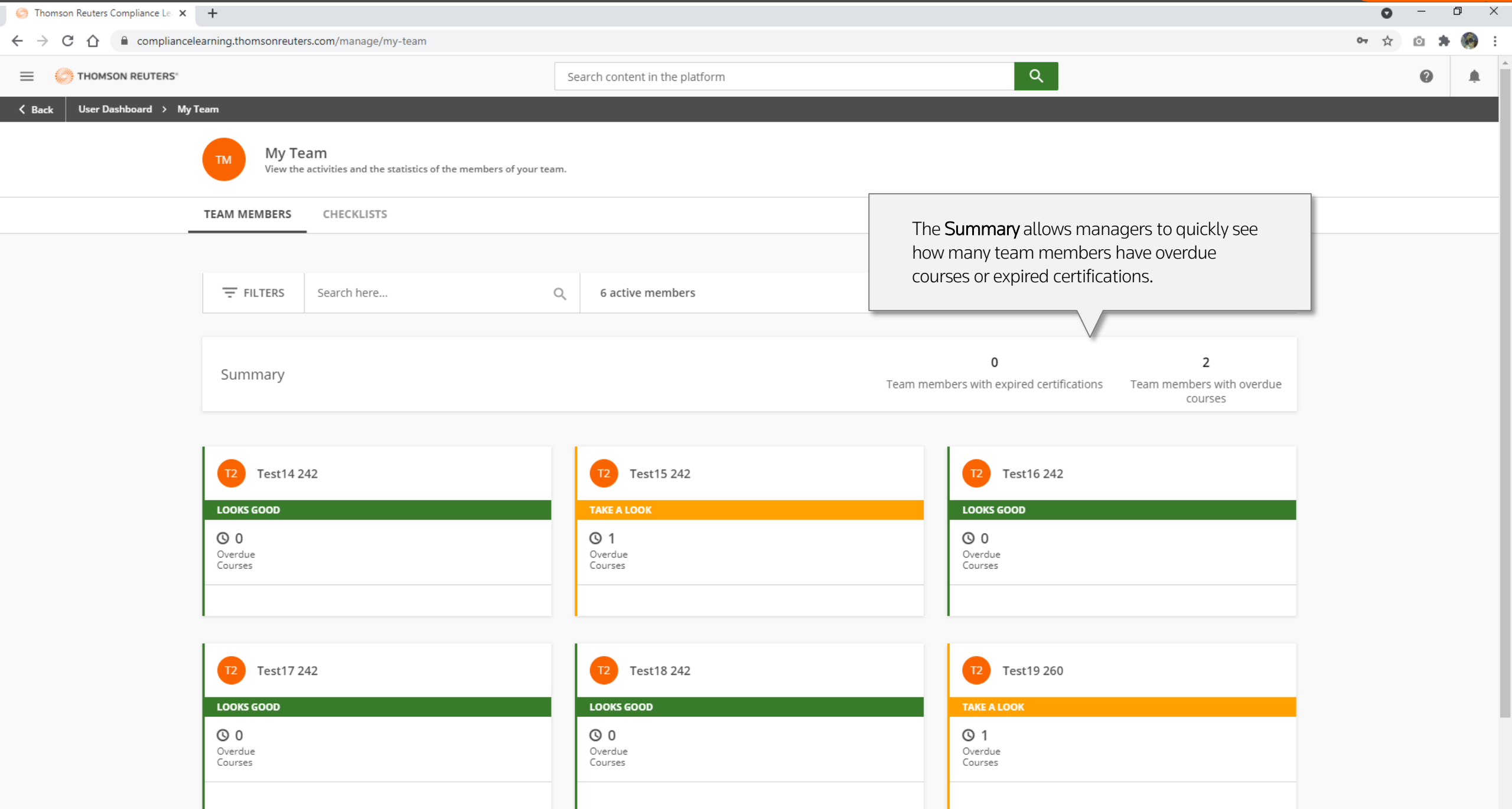
The **TEAM MEMBERS** page acts as a dashboard where the manager can see the status of their team's training.

Managers will be able to see their direct reports and drill down into their team member's reports, for instance, to see if anyone has overdue courses.

NOTE: This is standard functionality and cannot be changed.

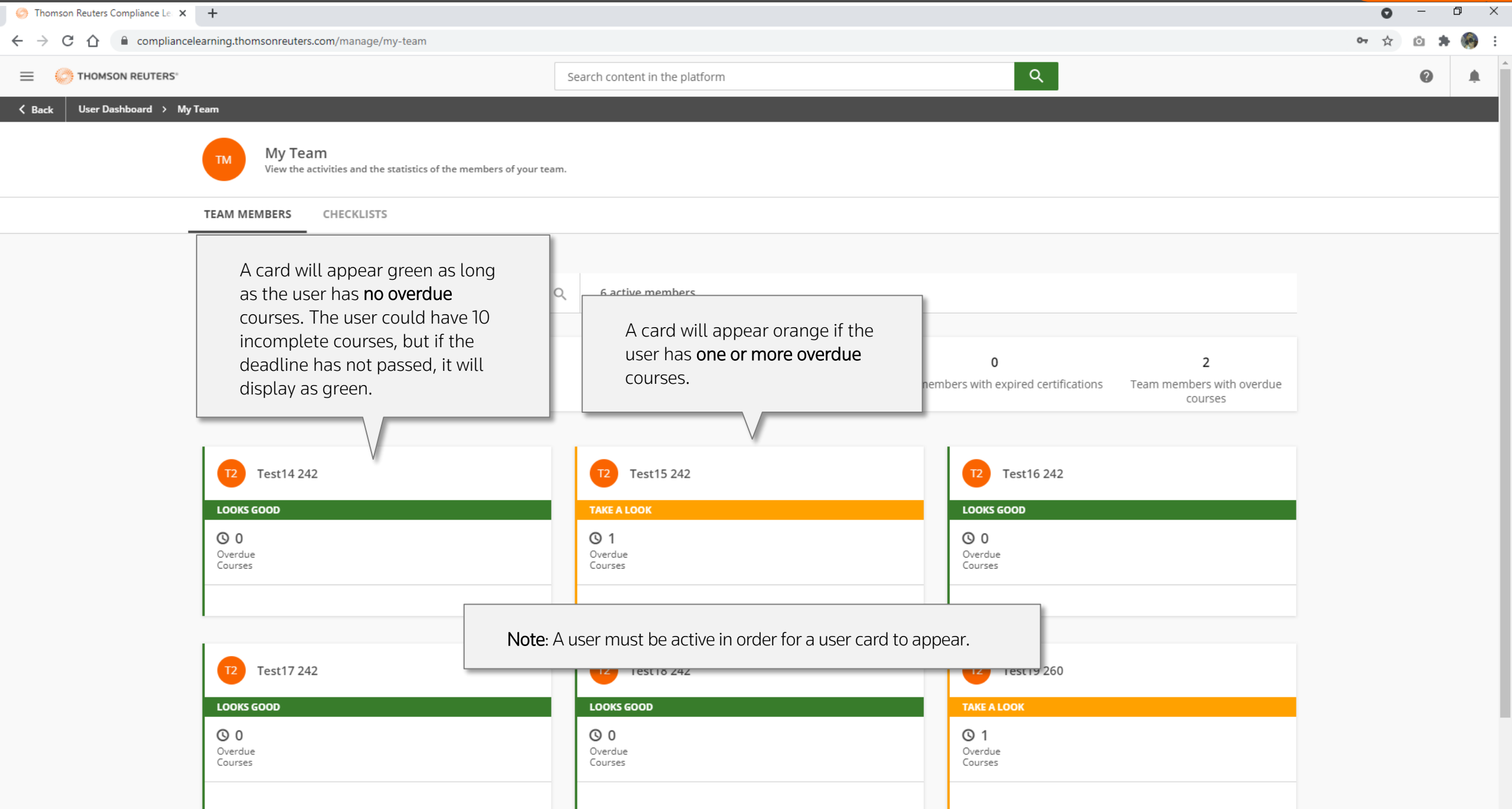
My Team Overview (3)

Return to Menu



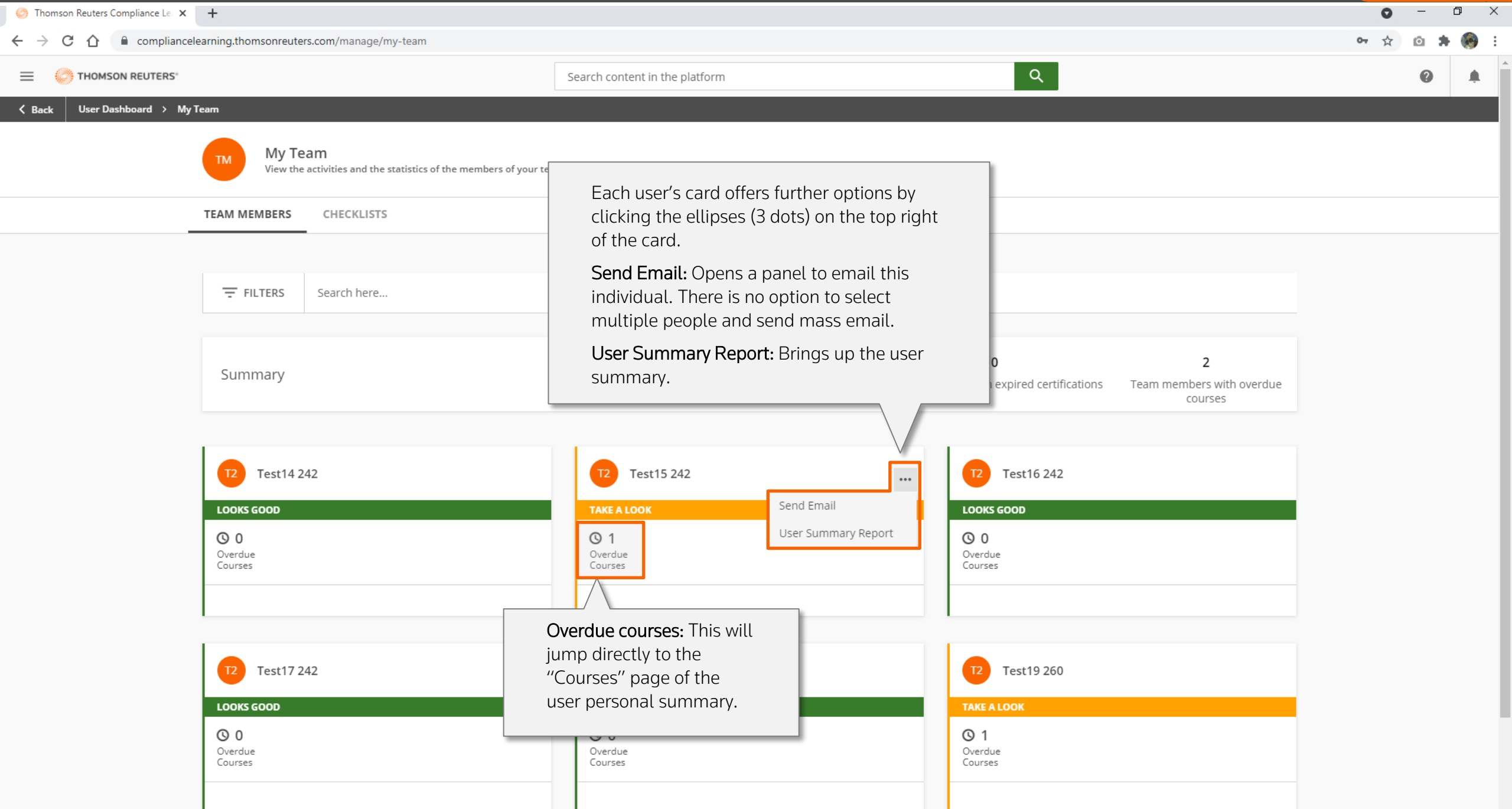
My Team Overview (4)

Return to Menu



My Team Overview (5)

Return to Menu



Each user's card offers further options by clicking the ellipses (3 dots) on the top right of the card.

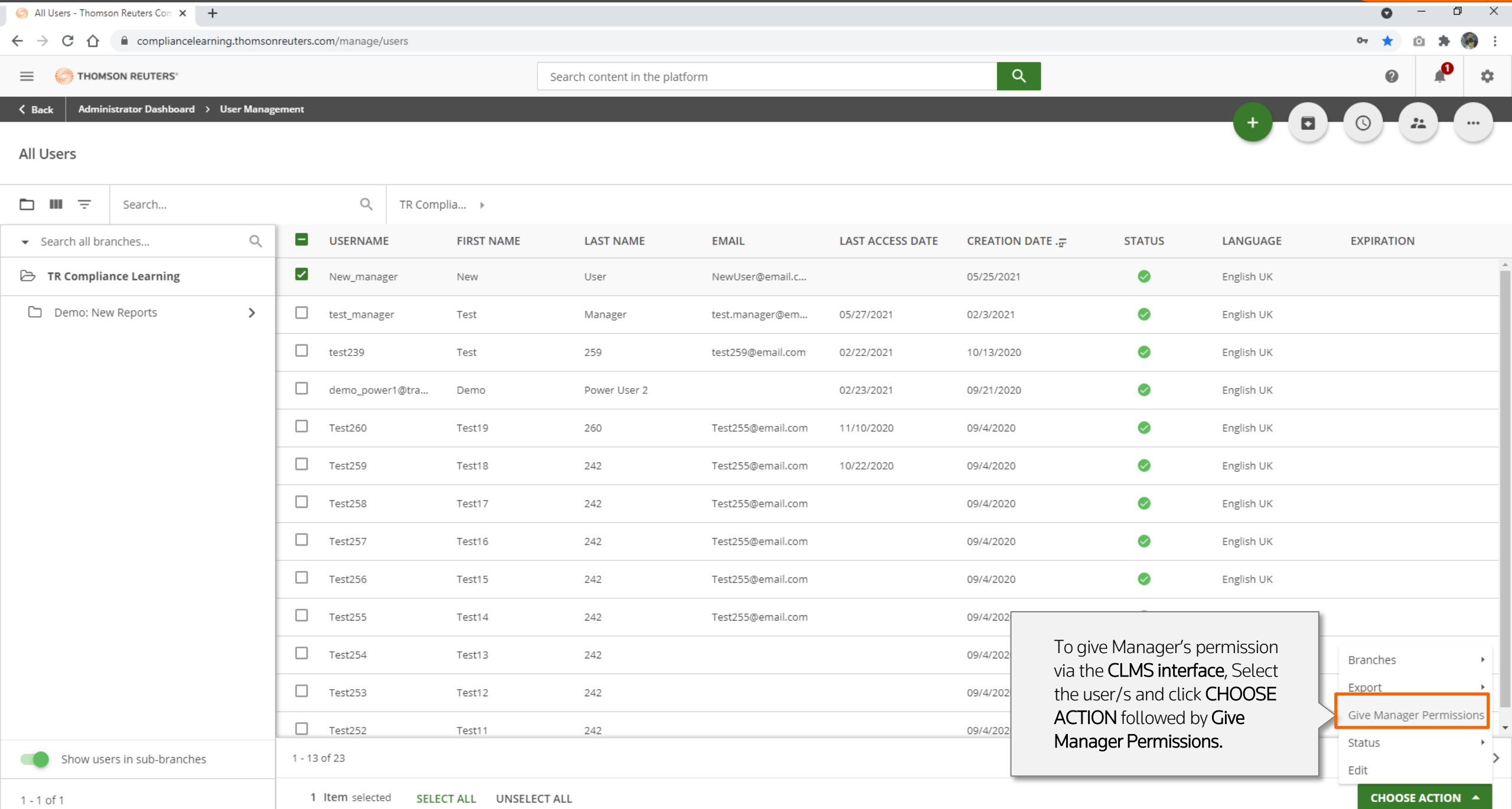
Send Email: Opens a panel to email this individual. There is no option to select multiple people and send mass email.

User Summary Report: Brings up the user summary.

Overdue courses: This will jump directly to the "Courses" page of the user personal summary.

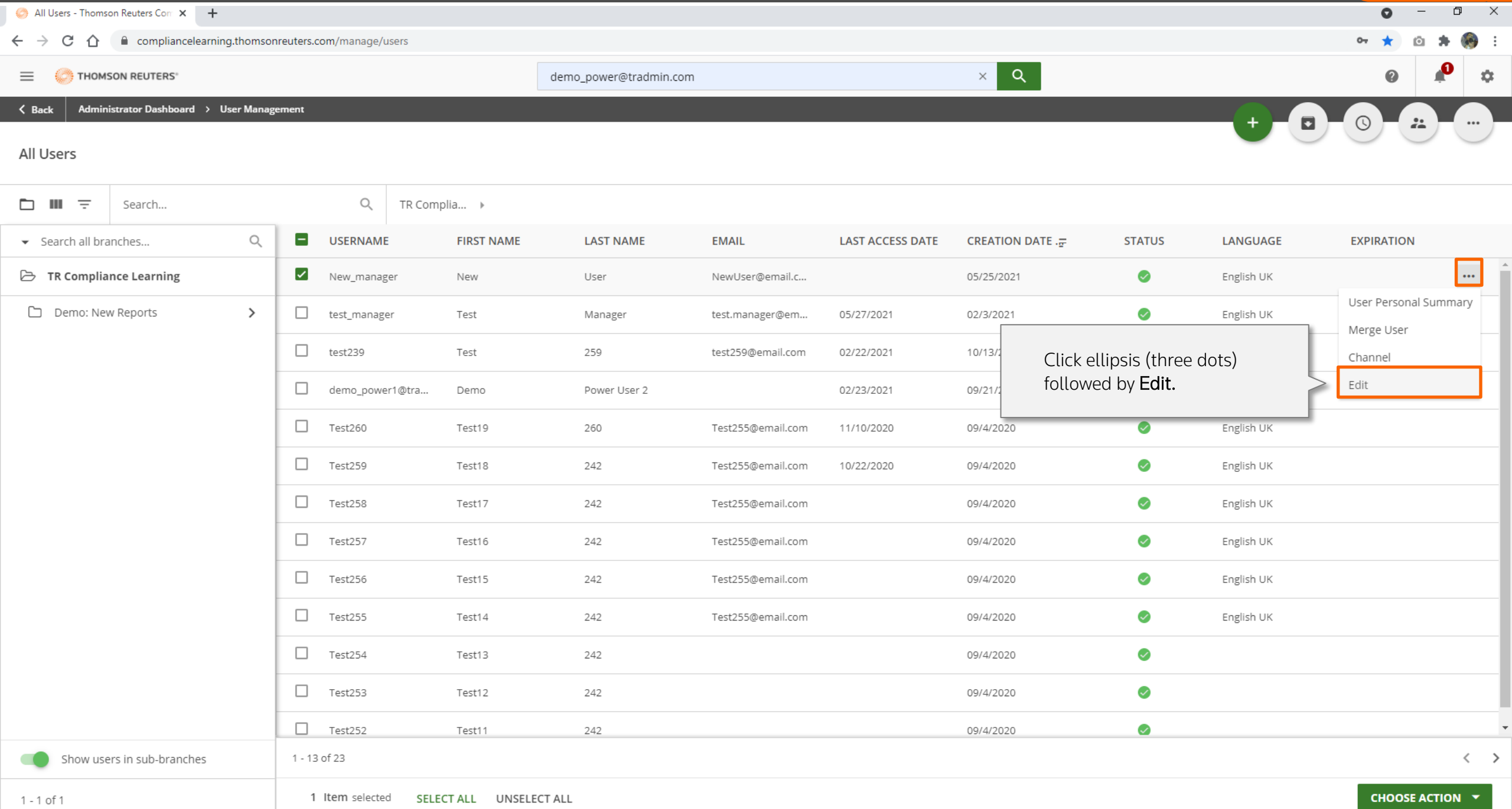
My Team - Set Up using CLMS Interface (1)

Return to Menu



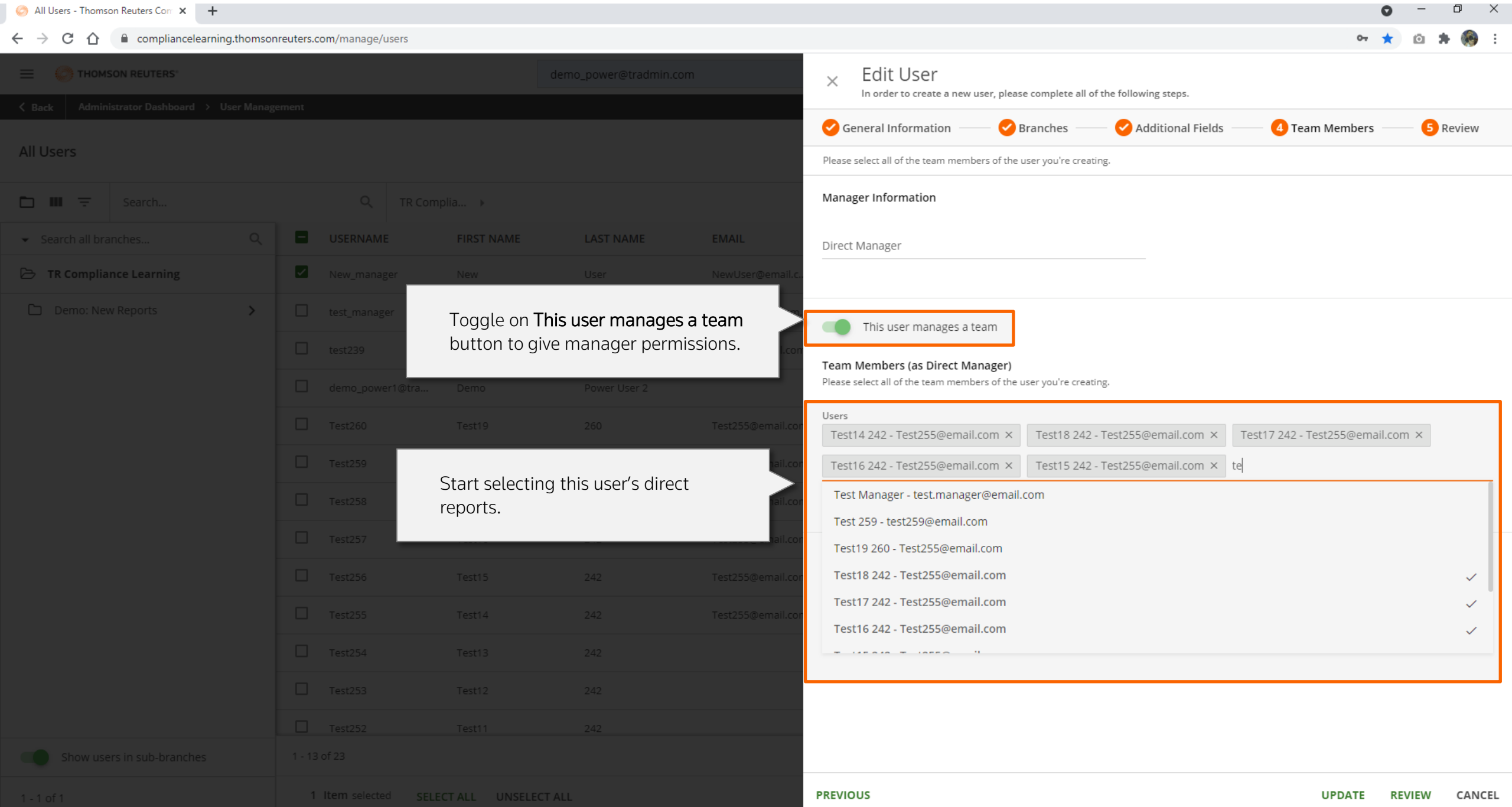
My Team - Set Up using CLMS Interface (2)

Return to Menu



My Team - Set Up using CLMS Interface (3)

Return to Menu



Toggle on **This user manages a team** button to give manager permissions.

Start selecting this user's direct reports.

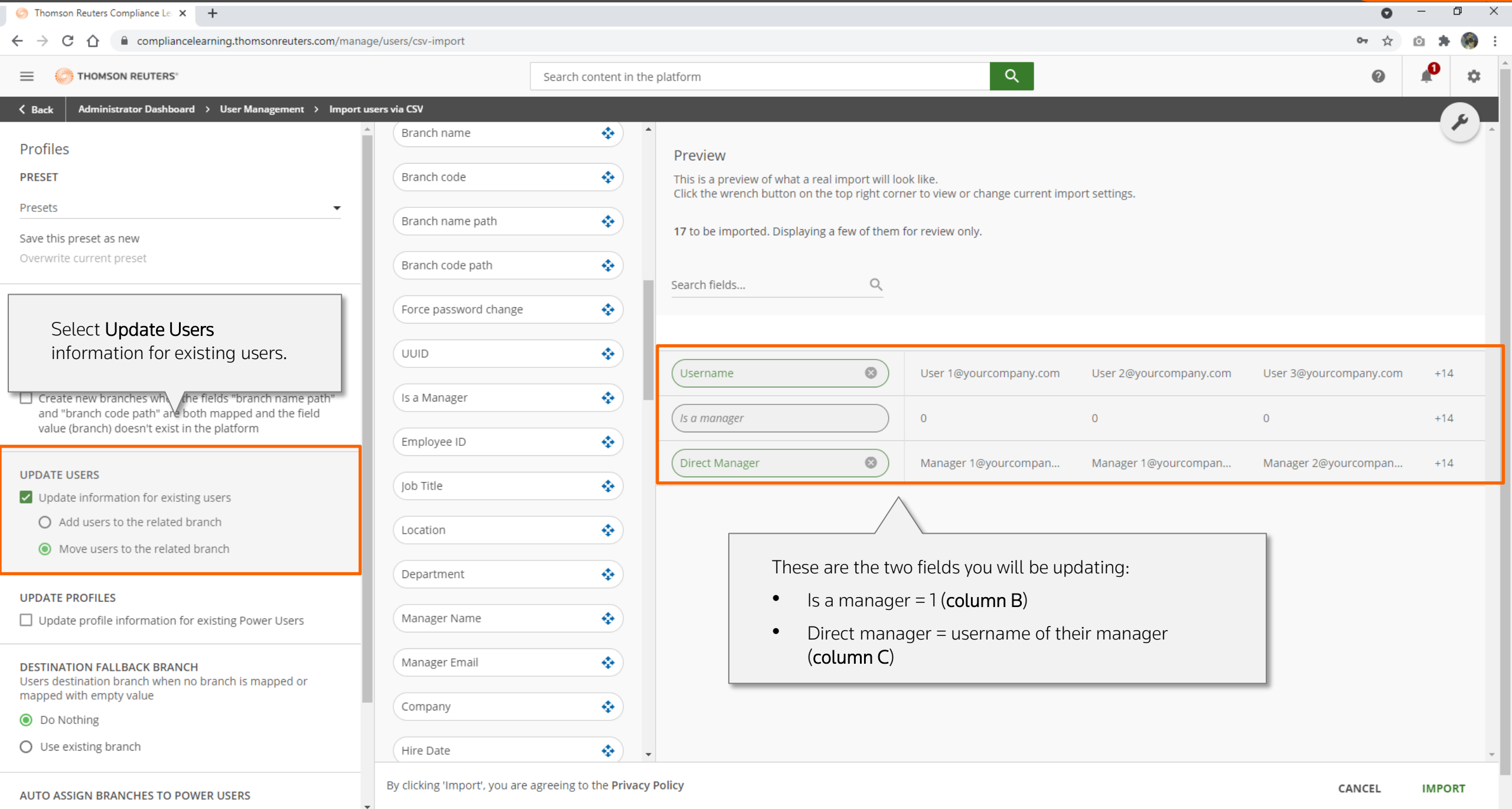
To add managers to the system or update existing accounts to enable this feature a .csv file needs to be created with the following data:

- **Column A:** Username of users
- **Column B**: Managers identified by entering "1" (the system will also accept Yes)
- **Column C**: Username of the individual's direct manager

	A	B	C
1	Username	Is a manager	Direct Manager
2	User 1@yourcompany.com	0	Manager 1@yourcompany.com
3	User 2@yourcompany.com	0	Manager 1@yourcompany.com
4	User 3@yourcompany.com	0	Manager 2@yourcompany.com
5	User 4@yourcompany.com	0	Manager 2@yourcompany.com
6	User 5@yourcompany.com	0	Manager 3@yourcompany.com
7	User 6@yourcompany.com	0	Manager 1@yourcompany.com
8	User 7@yourcompany.com	0	Manager 1@yourcompany.com
9	User 8@yourcompany.com	0	Manager 2@yourcompany.com
10	User 9@yourcompany.com	0	Manager 2@yourcompany.com
11	User 10@yourcompany.com	0	Manager 1@yourcompany.com
12	Manager 1@yourcompany.com	1	Manager 1@yourcompany.com
13	User 12@yourcompany.com	0	Manager 3@yourcompany.com
14	User 13@yourcompany.com	0	Manager 3@yourcompany.com
15	Manager 2@yourcompany.com	1	Manager 2@yourcompany.com
16	User 15@yourcompany.com	0	Manager 2@yourcompany.com
17	User 16@yourcompany.com	0	Manager 2@yourcompany.com
18	Manager 3@yourcompany.com	1	Manager 2@yourcompany.com

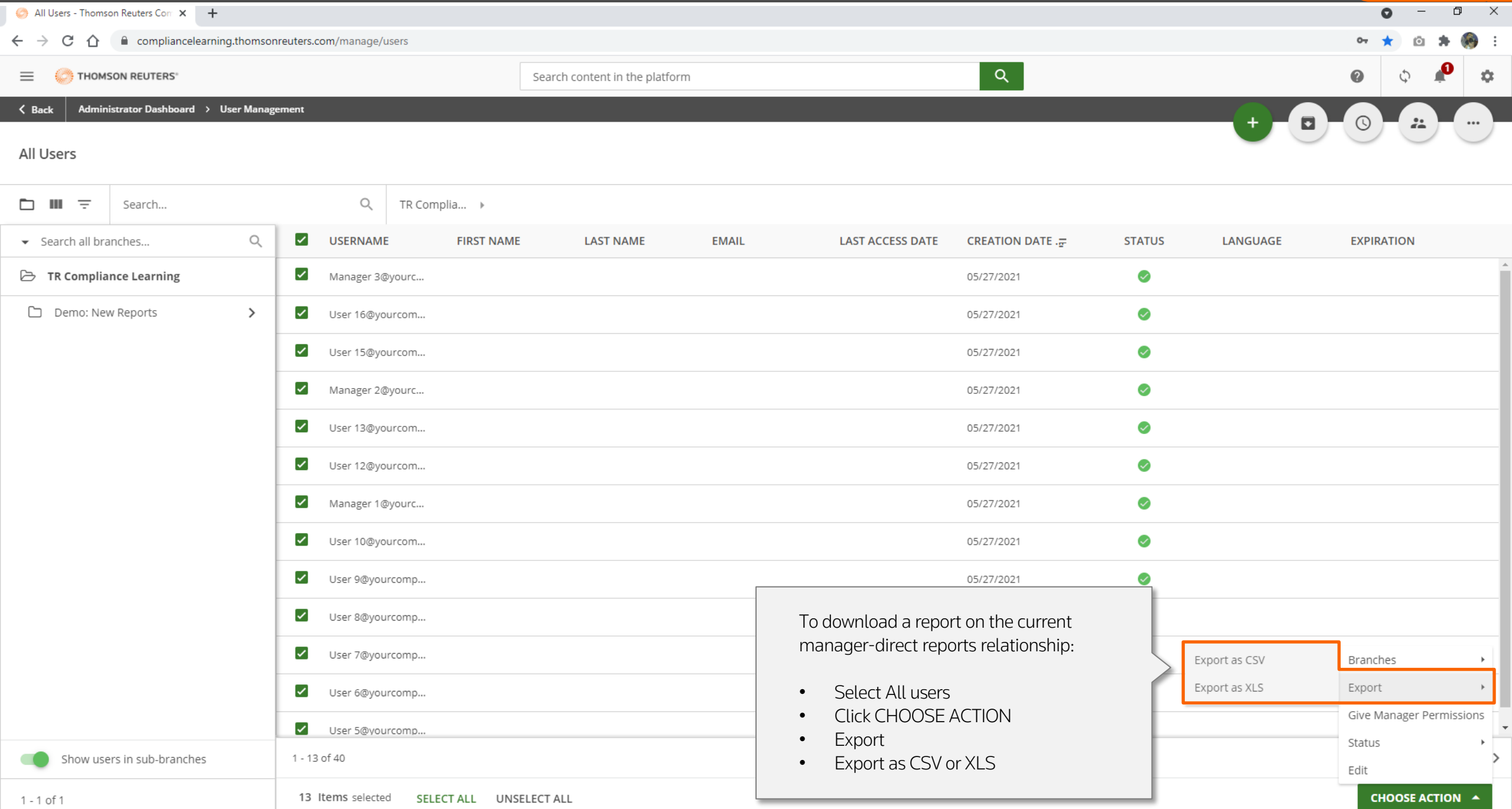
My Team - Set Up using Bulk Upload Tool (3)

Return to Menu



My Team - Download Manager Details (1)

Return to Menu

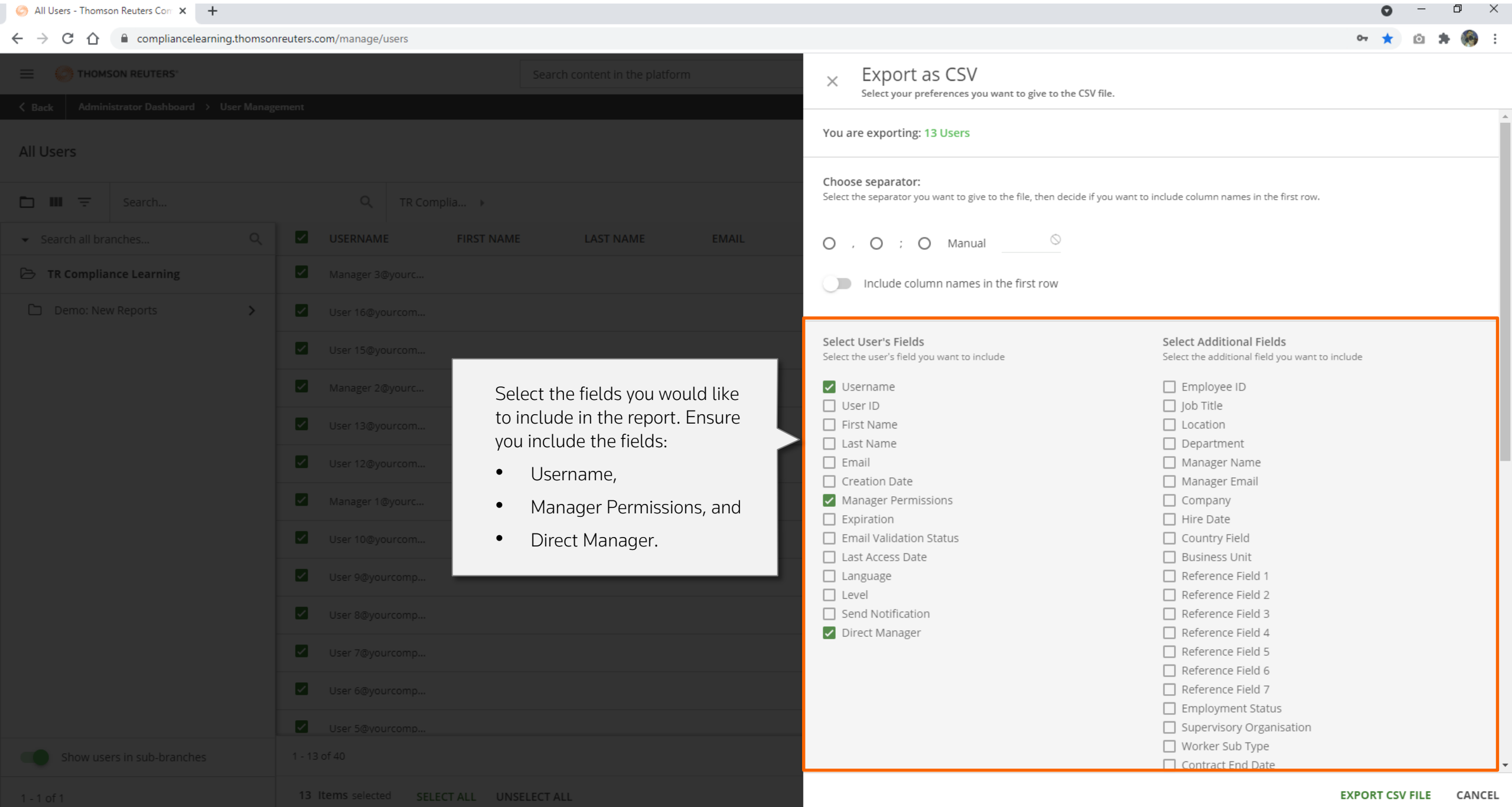


To download a report on the current manager-direct reports relationship:

- Select All users
- Click CHOOSE ACTION
- Export
- Export as CSV or XLS

My Team - Download Manager Details (2)

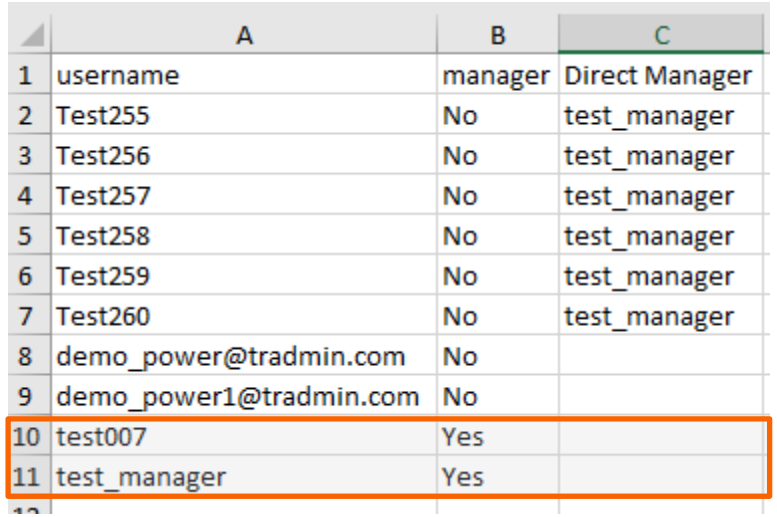
Return to Menu



Select the fields you would like to include in the report. Ensure you include the fields:

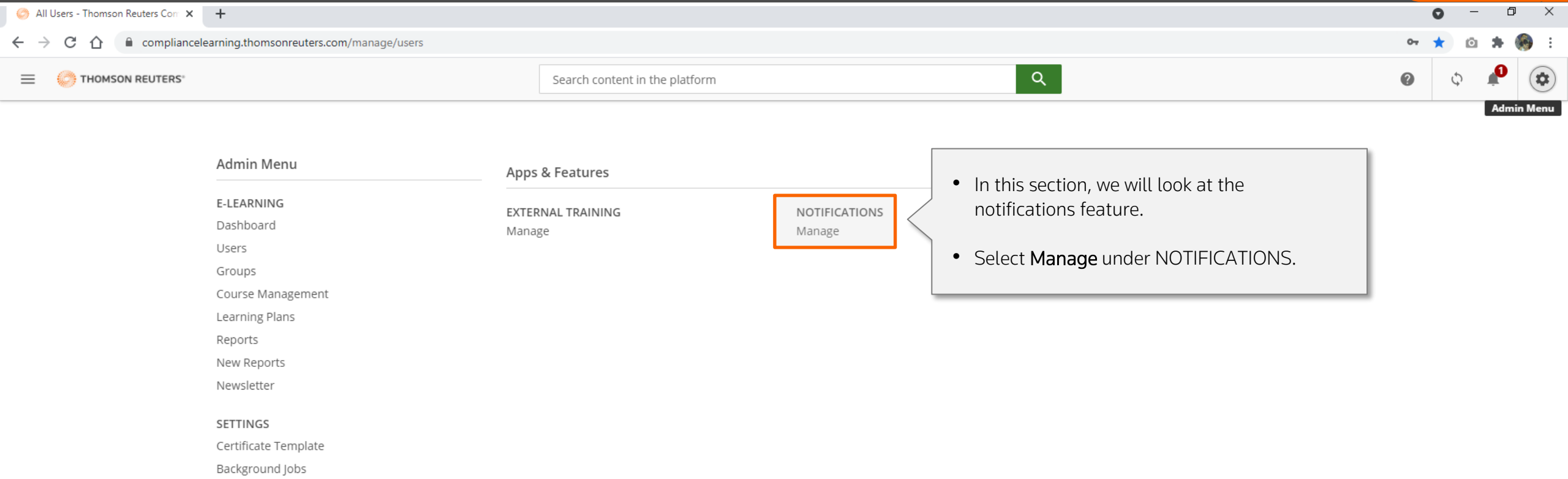
- Username,
- Manager Permissions, and
- Direct Manager.

The system will generate a report, with manager-direct reports relationship. The direct managers will be indicated with a **Yes** as their field value.



	A	B	C
1	username	manager	Direct Manager
2	Test255	No	test_manager
3	Test256	No	test_manager
4	Test257	No	test_manager
5	Test258	No	test_manager
6	Test259	No	test_manager
7	Test260	No	test_manager
8	demo_power@tradmin.com	No	
9	demo_power1@tradmin.com	No	
10	test007	Yes	
11	test_manager	Yes	

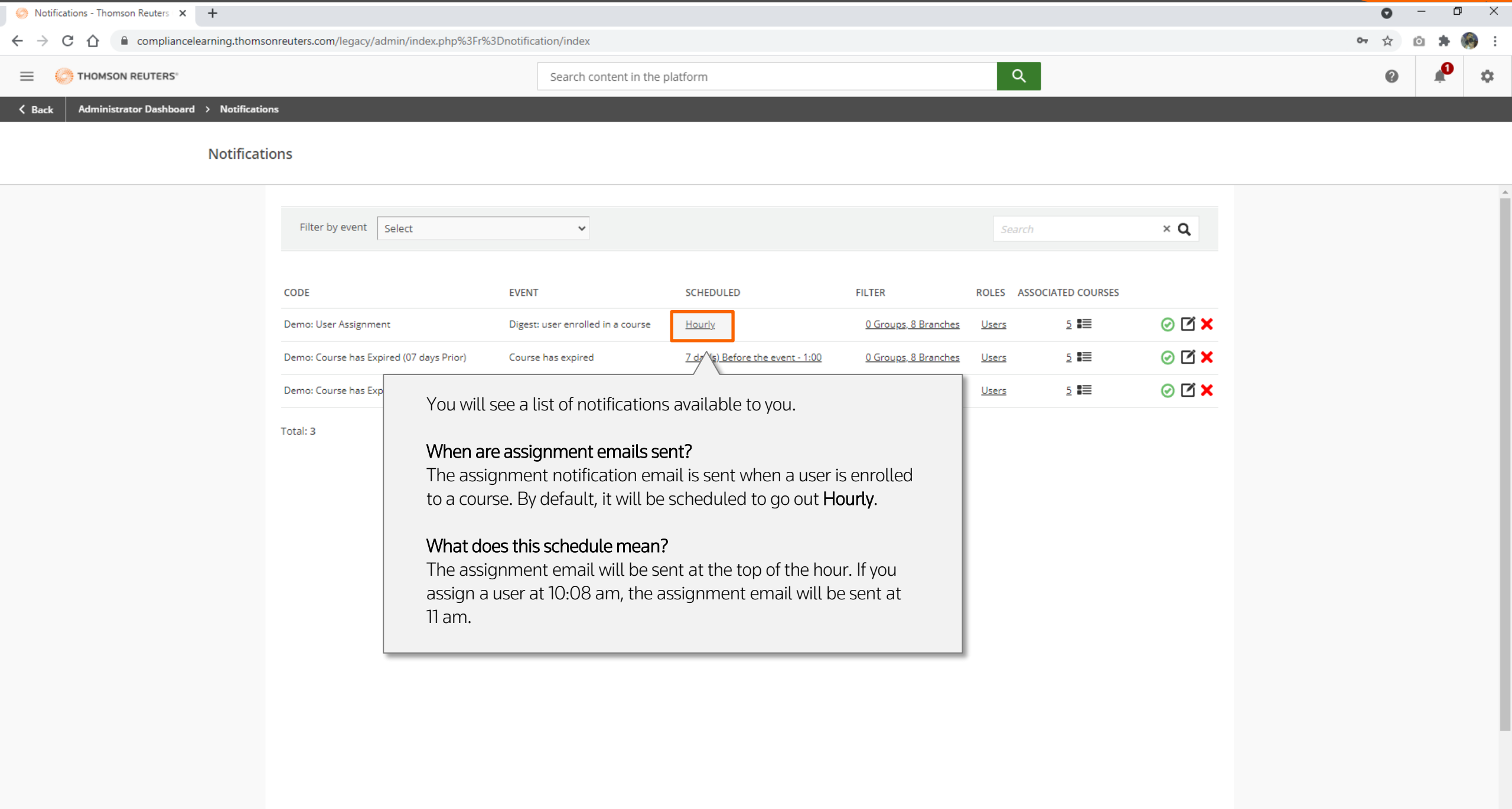
Managing Notifications



- In this section, we will look at the notifications feature.
- Select **Manage** under NOTIFICATIONS.

Managing the Email Schedule (1)

Return to Menu



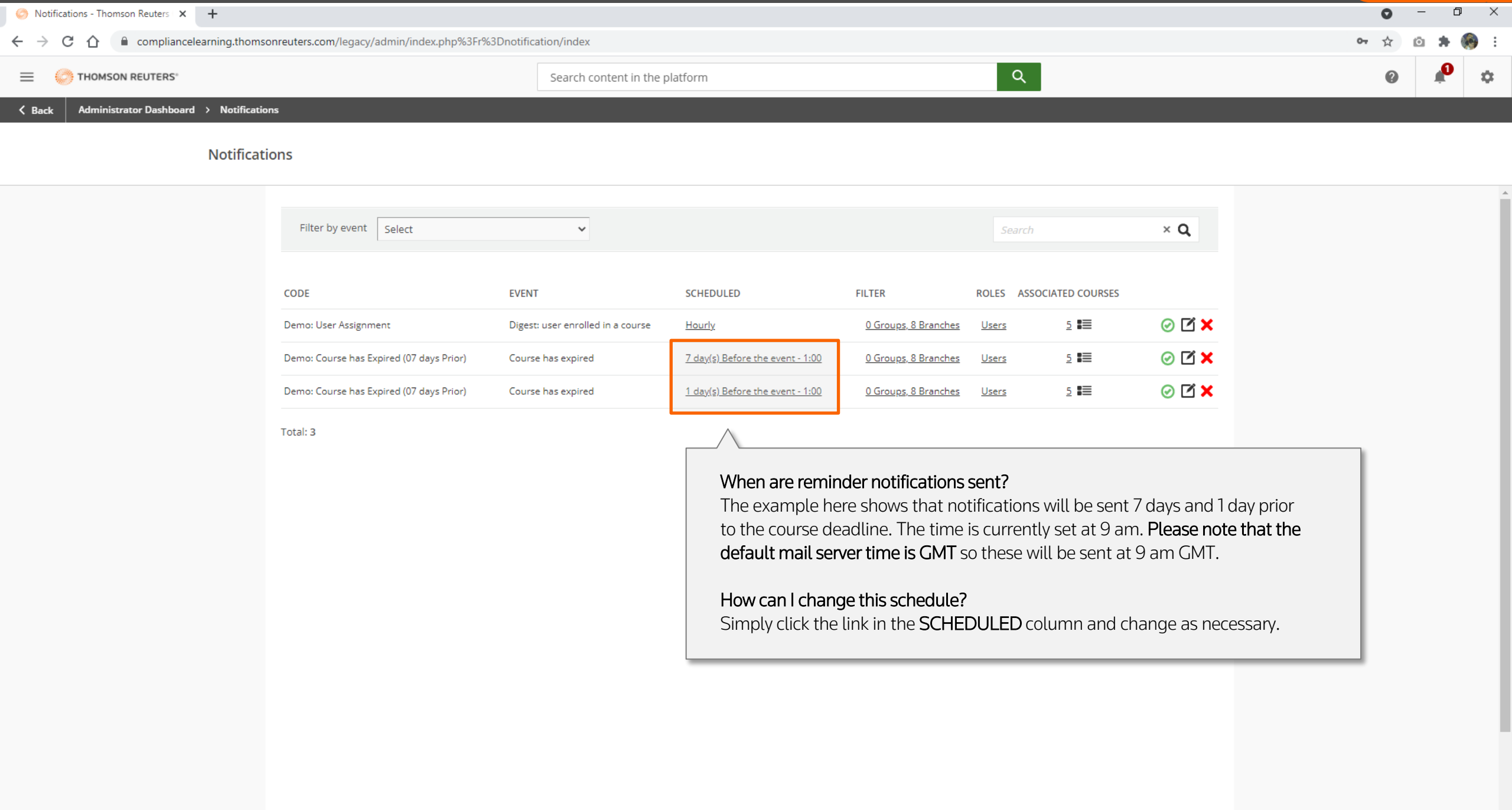
You will see a list of notifications available to you.

When are assignment emails sent?
The assignment notification email is sent when a user is enrolled to a course. By default, it will be scheduled to go out **Hourly**.

What does this schedule mean?
The assignment email will be sent at the top of the hour. If you assign a user at 10:08 am, the assignment email will be sent at 11 am.

Managing the Email Schedule (2)

Return to Menu

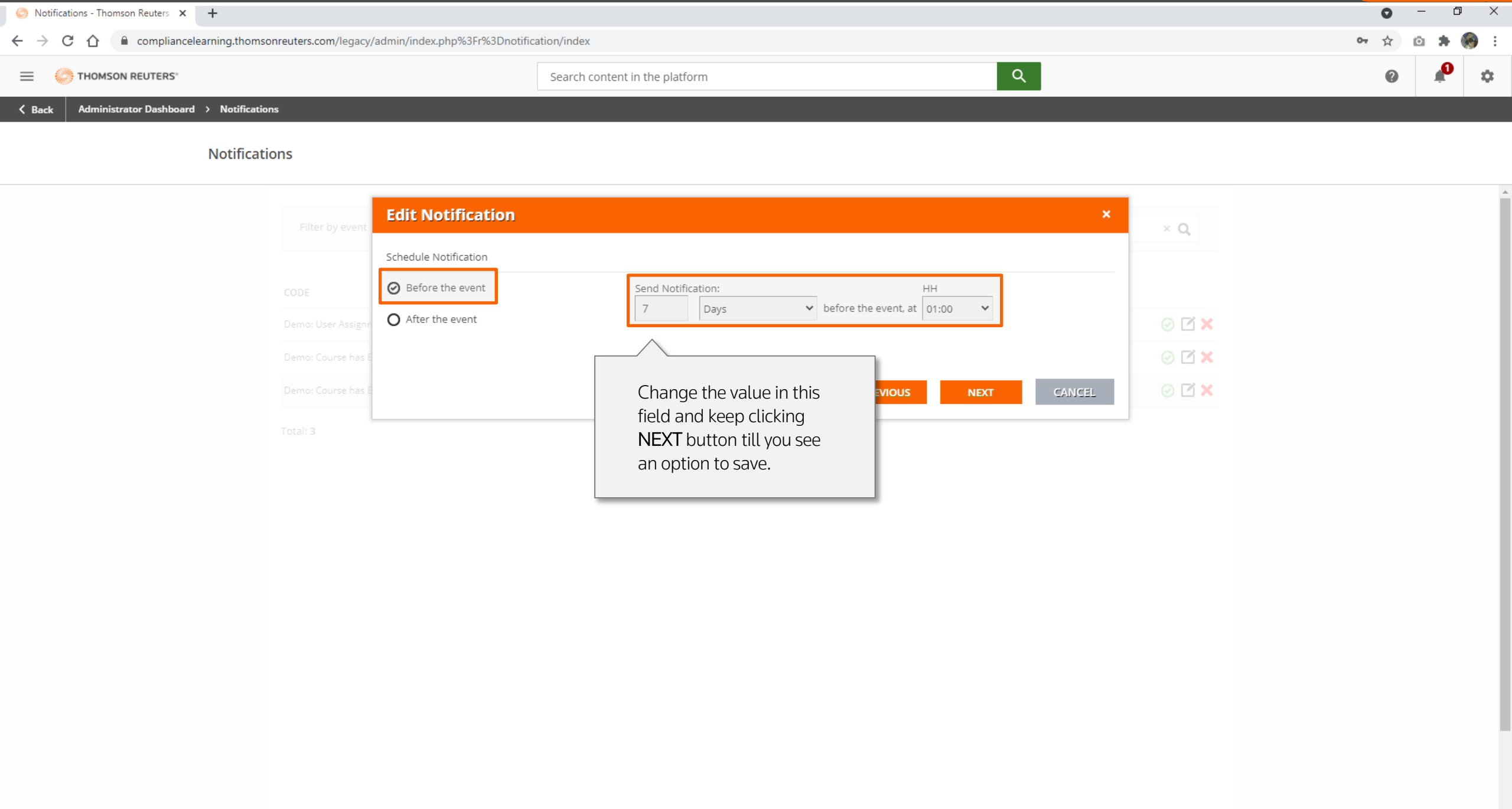


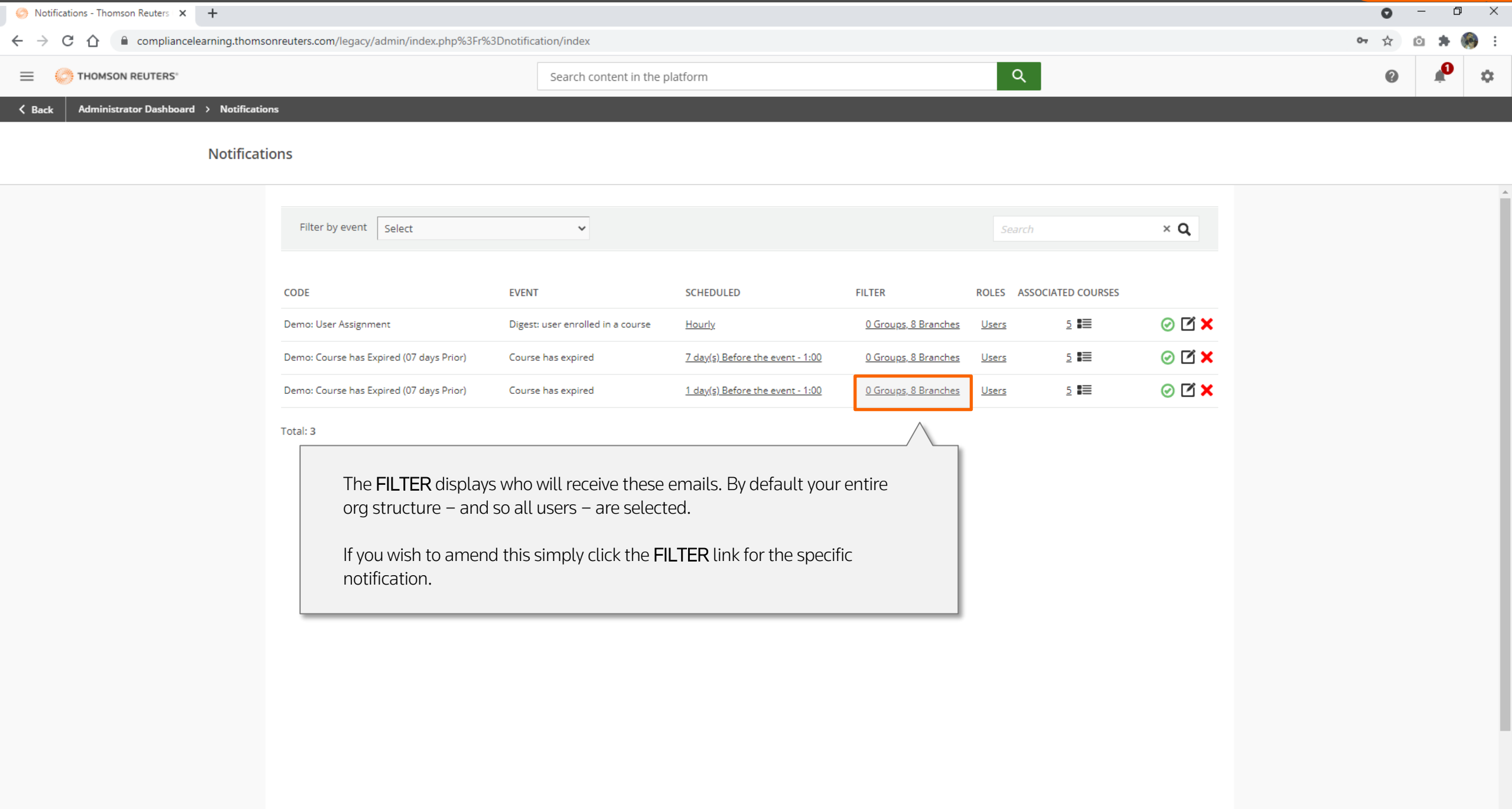
When are reminder notifications sent?
The example here shows that notifications will be sent 7 days and 1 day prior to the course deadline. The time is currently set at 9 am. **Please note that the default mail server time is GMT** so these will be sent at 9 am GMT.

How can I change this schedule?
Simply click the link in the **SCHEDULED** column and change as necessary.

Managing the Email Schedule (3)

Return to Menu



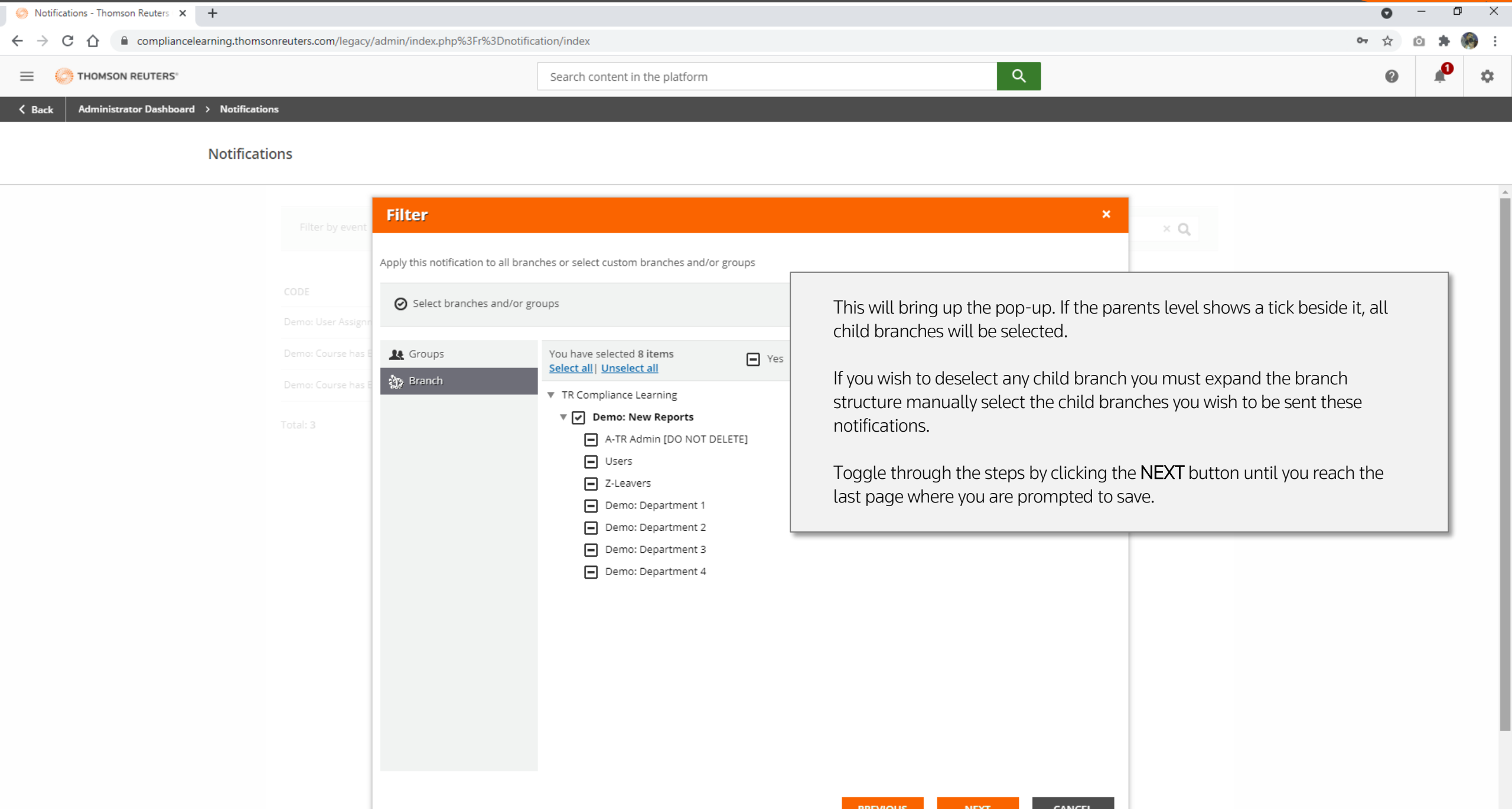


The **FILTER** displays who will receive these emails. By default your entire org structure – and so all users – are selected.

If you wish to amend this simply click the **FILTER** link for the specific notification.

Managing Email Recipients (2)

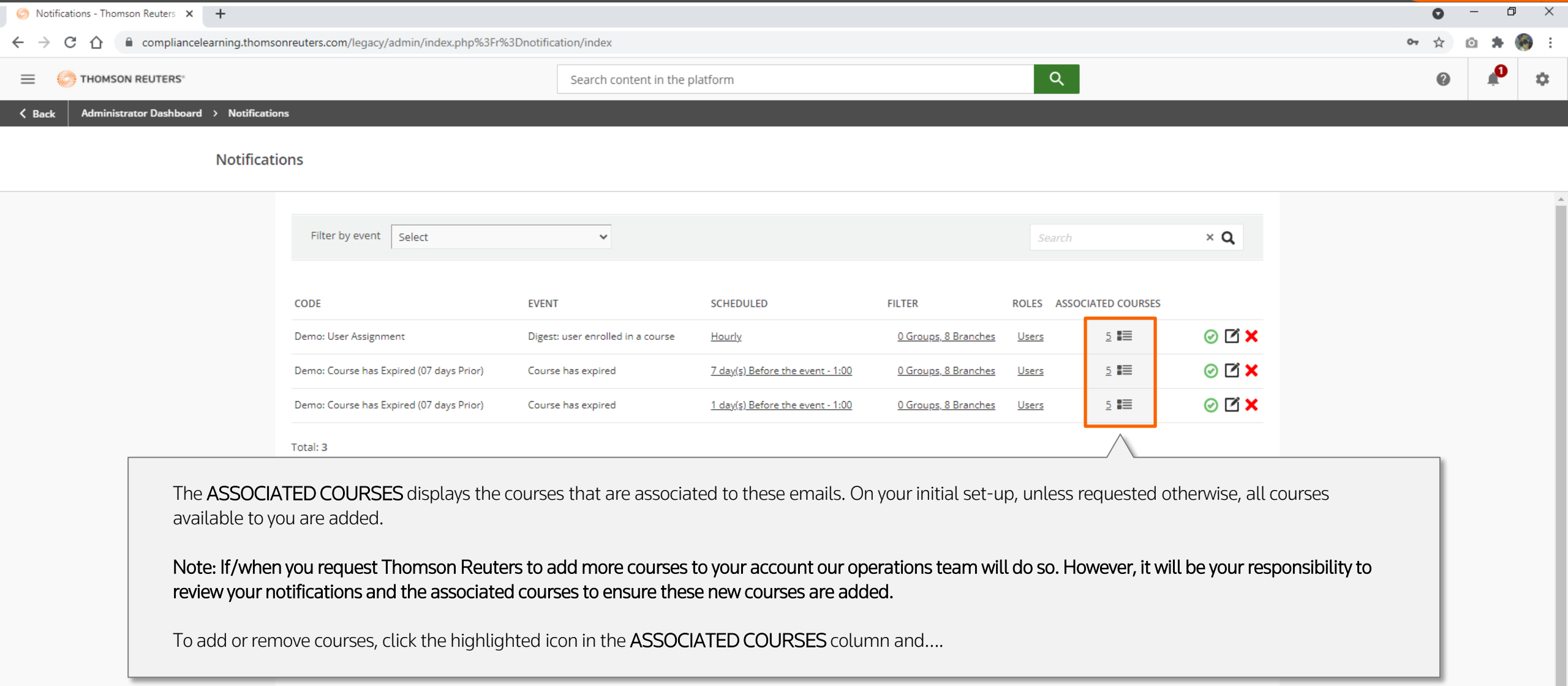
Return to Menu



This will bring up the pop-up. If the parents level shows a tick beside it, all child branches will be selected.

If you wish to deselect any child branch you must expand the branch structure manually select the child branches you wish to be sent these notifications.

Toggle through the steps by clicking the NEXT button until you reach the last page where you are prompted to save.



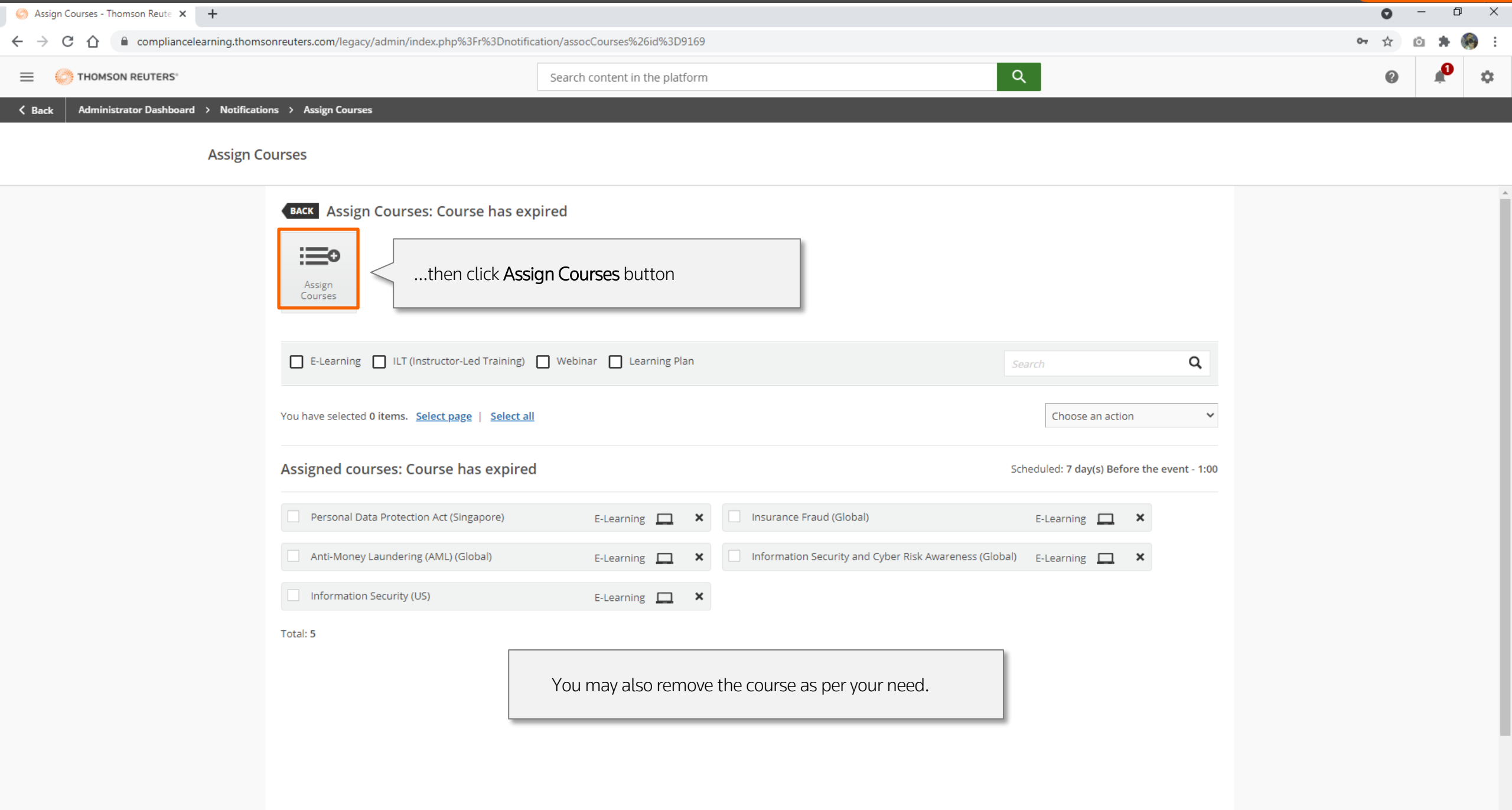
The **ASSOCIATED COURSES** displays the courses that are associated to these emails. On your initial set-up, unless requested otherwise, all courses available to you are added.

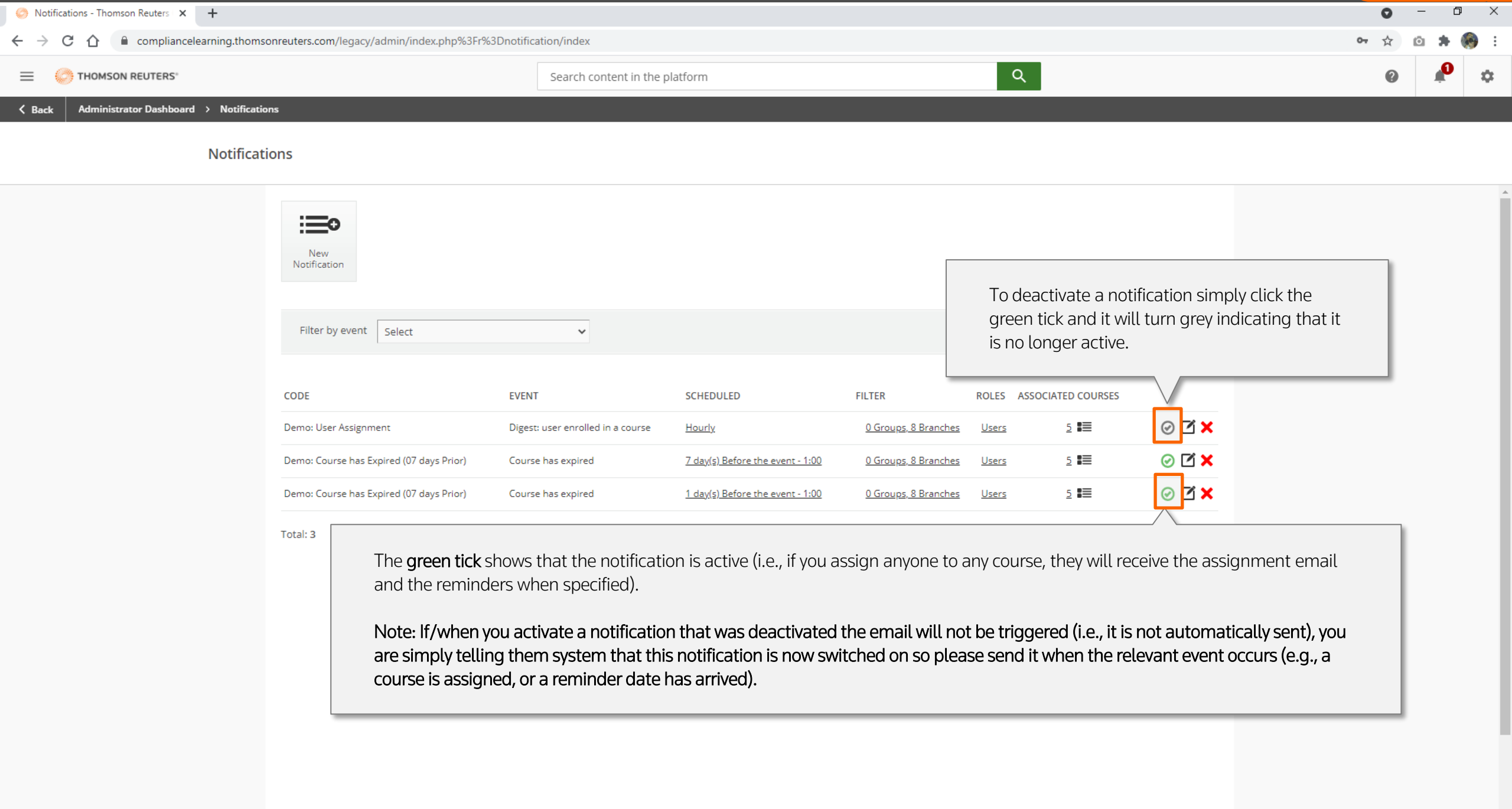
Note: If/when you request Thomson Reuters to add more courses to your account our operations team will do so. However, it will be your responsibility to review your notifications and the associated courses to ensure these new courses are added.

To add or remove courses, click the highlighted icon in the **ASSOCIATED COURSES** column and….

Managing Associated Courses (2)

Return to Menu





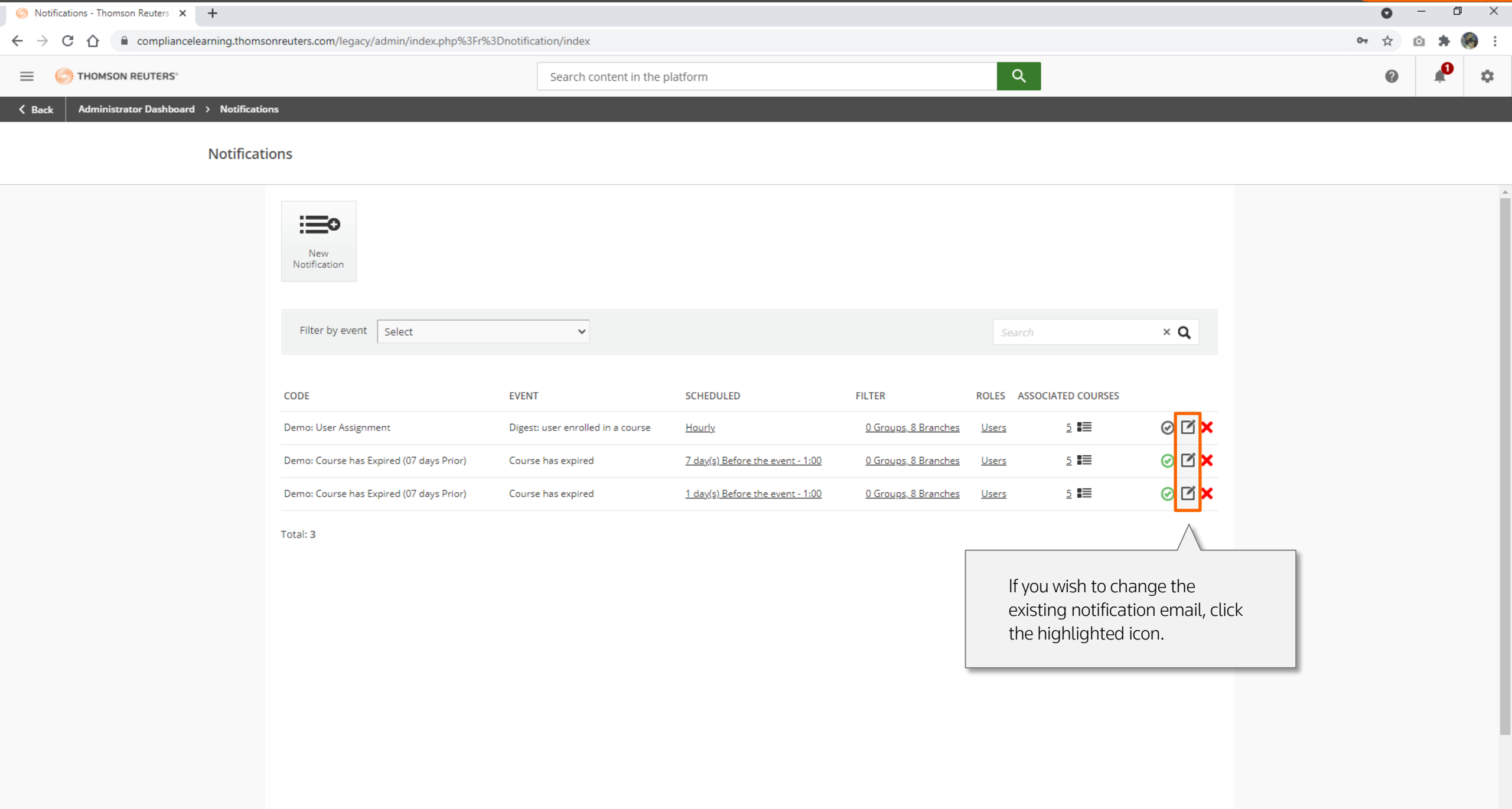
To deactivate a notification simply click the green tick and it will turn grey indicating that it is no longer active.

The **green tick** shows that the notification is active (i.e., if you assign anyone to any course, they will receive the assignment email and the reminders when specified).

Note: If/when you activate a notification that was deactivated the email will not be triggered (i.e., it is not automatically sent), you are simply telling them system that this notification is now switched on so please send it when the relevant event occurs (e.g., a course is assigned, or a reminder date has arrived).

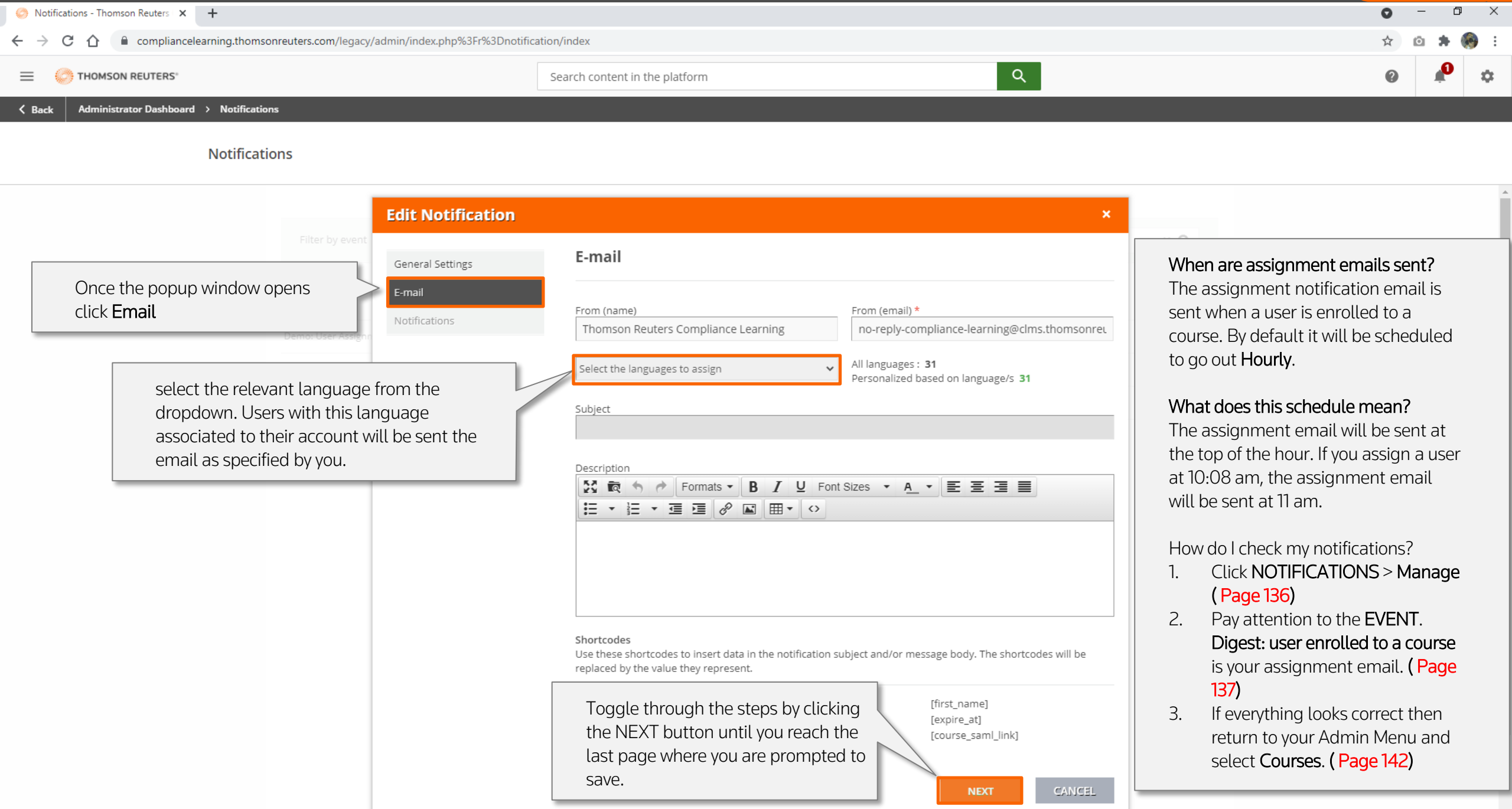
Editing Existing Emails (1)

Return to Menu



Editing Existing Emails (2)

Return to Menu



Once the popup window opens click **Email**

select the relevant language from the dropdown. Users with this language associated to their account will be sent the email as specified by you.

Toggle through the steps by clicking the NEXT button until you reach the last page where you are prompted to save.

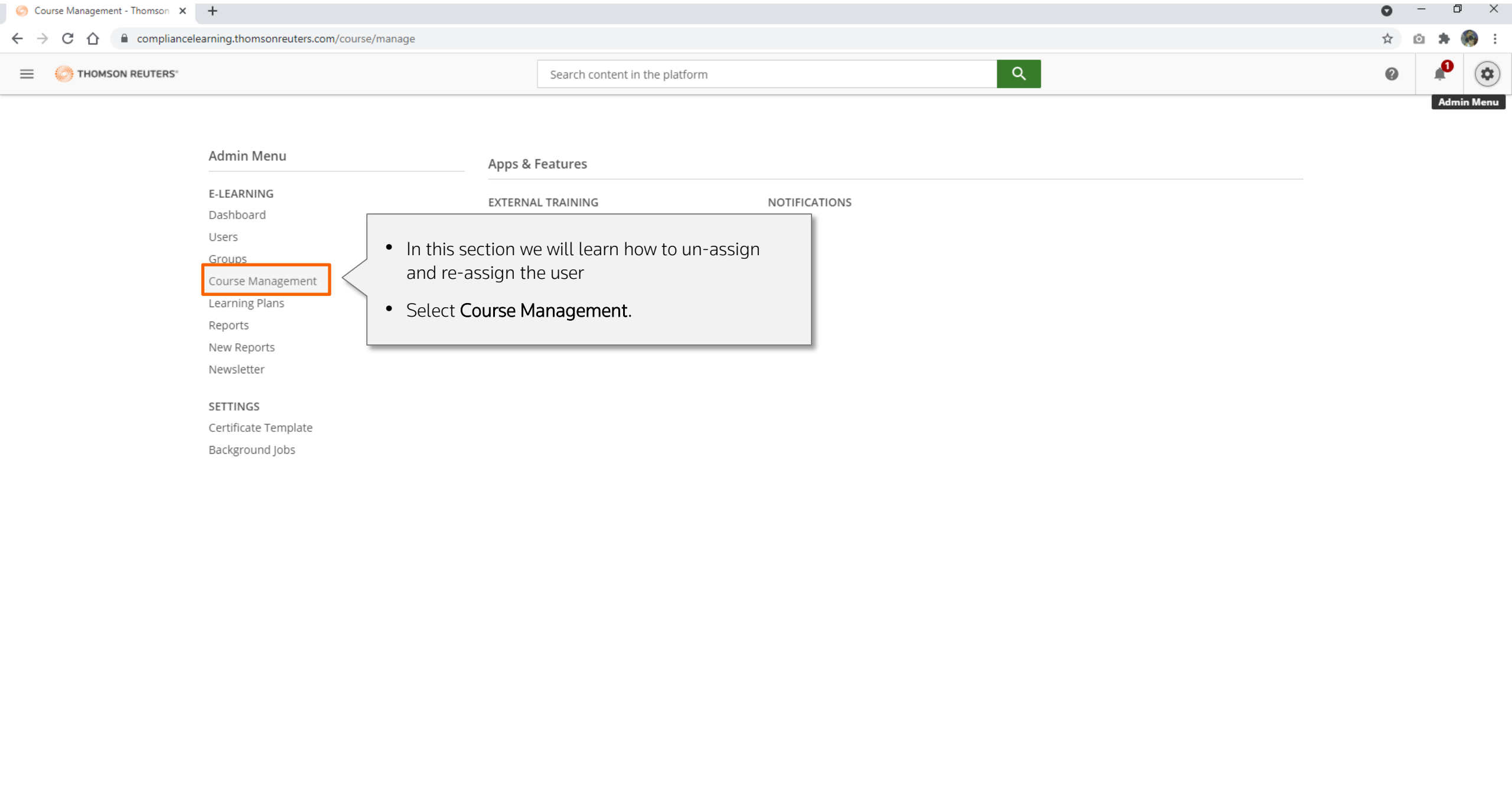
When are assignment emails sent?
The assignment notification email is sent when a user is enrolled to a course. By default it will be scheduled to go out **Hourly**.

What does this schedule mean?
The assignment email will be sent at the top of the hour. If you assign a user at 10:08 am, the assignment email will be sent at 11 am.

How do I check my notifications?

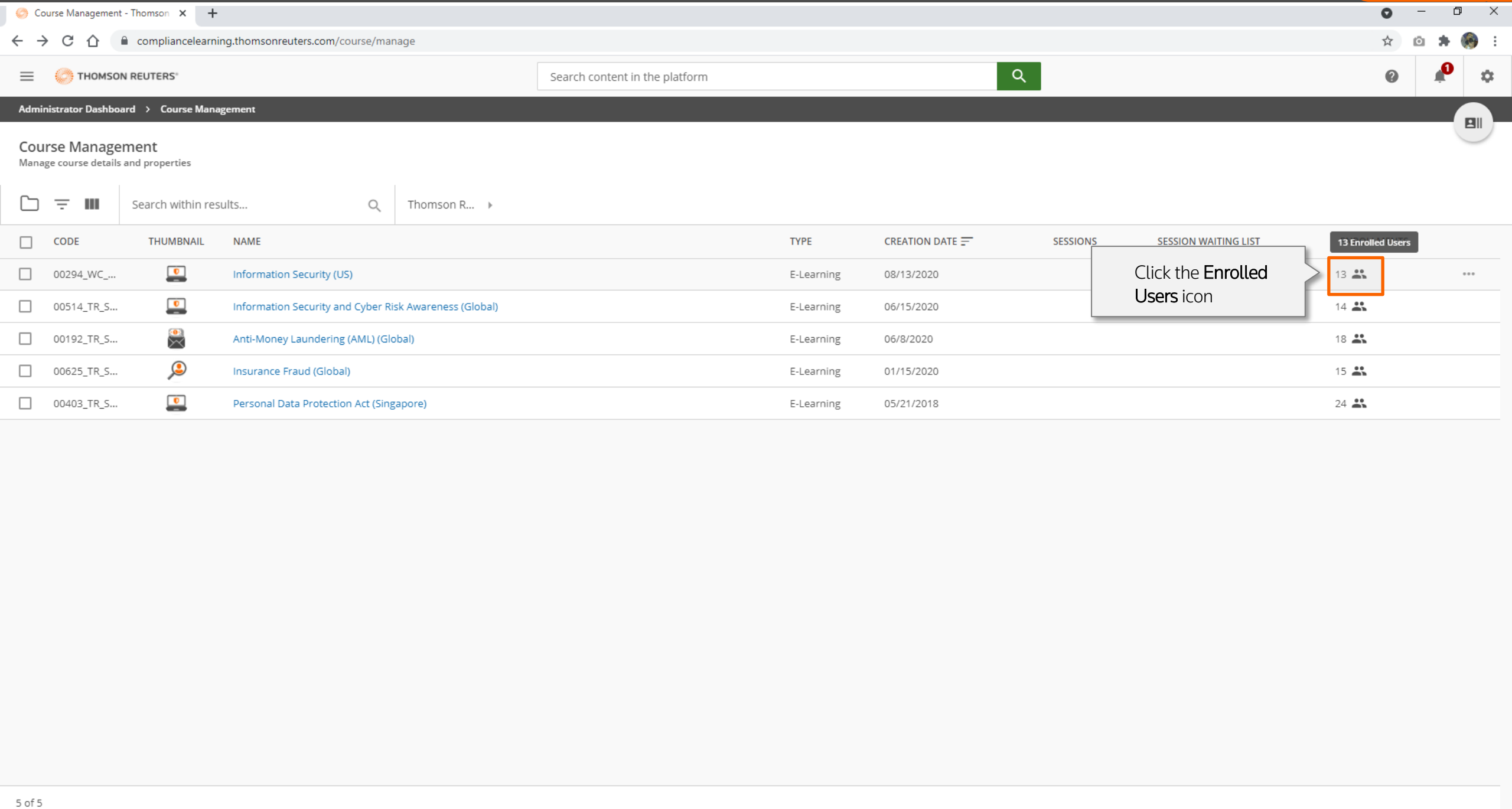
1. Click **NOTIFICATIONS** > **Manage** (Page 136)
2. Pay attention to the **EVENT**. **Digest: user enrolled to a course** is your assignment email. (Page 137)
3. If everything looks correct then return to your Admin Menu and select **Courses**. (Page 142)

Unassigning and Reassigning Users


Course Management - Thomson
compliancelearning.thomsonreuters.com/course/manage
THOMSON REUTERS
Search content in the platform
Admin Menu
Admin Menu
E-LEARNING
Dashboard
Users
Groups
Course Management
Learning Plans
Reports
New Reports
Newsletter
SETTINGS
Certificate Template
Background Jobs
Apps & Features
EXTERNAL TRAINING
NOTIFICATIONS
In this section we will learn how to un-assign and re-assign the user
Select Course Management.

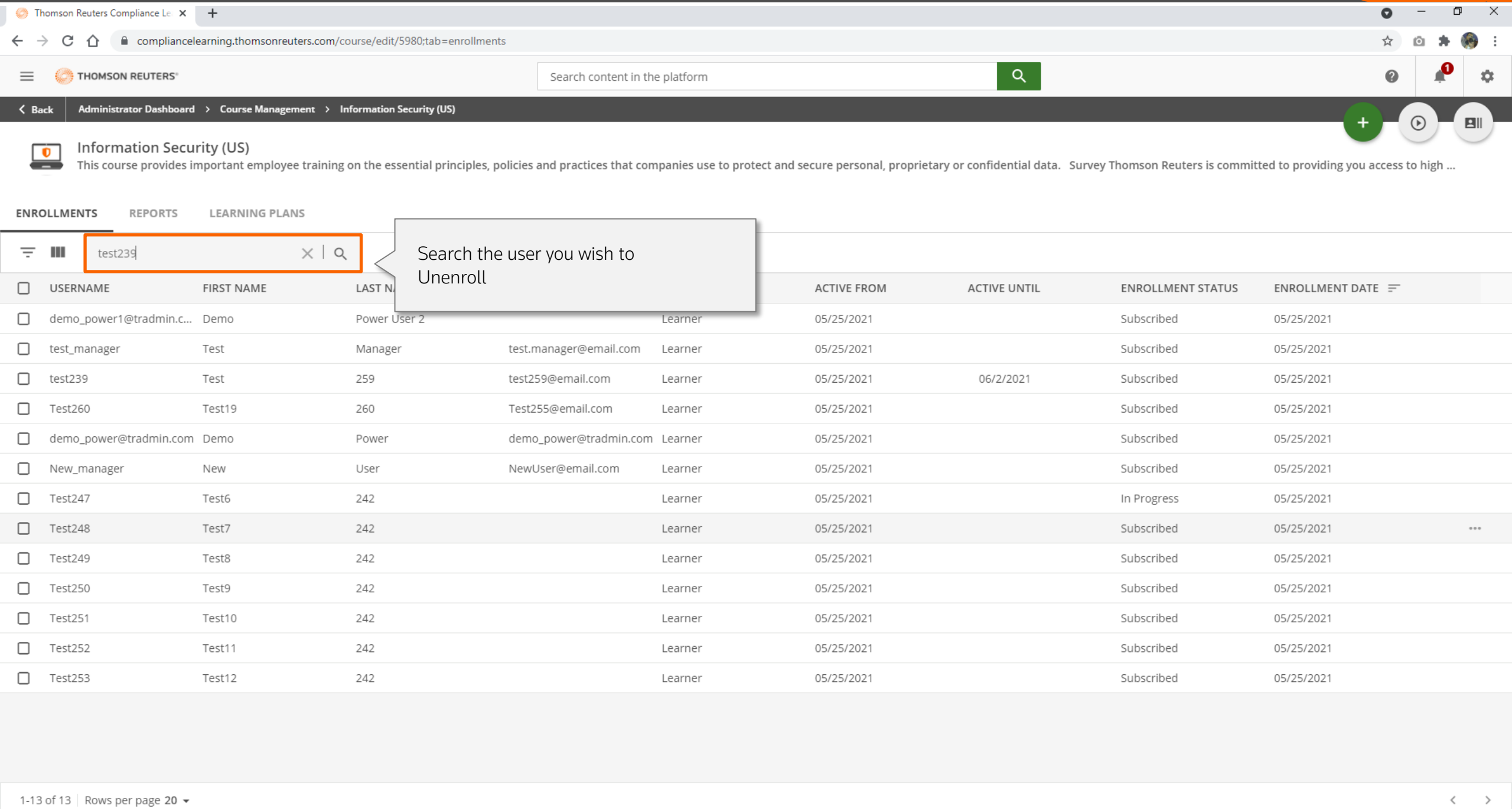
Un-assigning A User (1)

Return to Menu



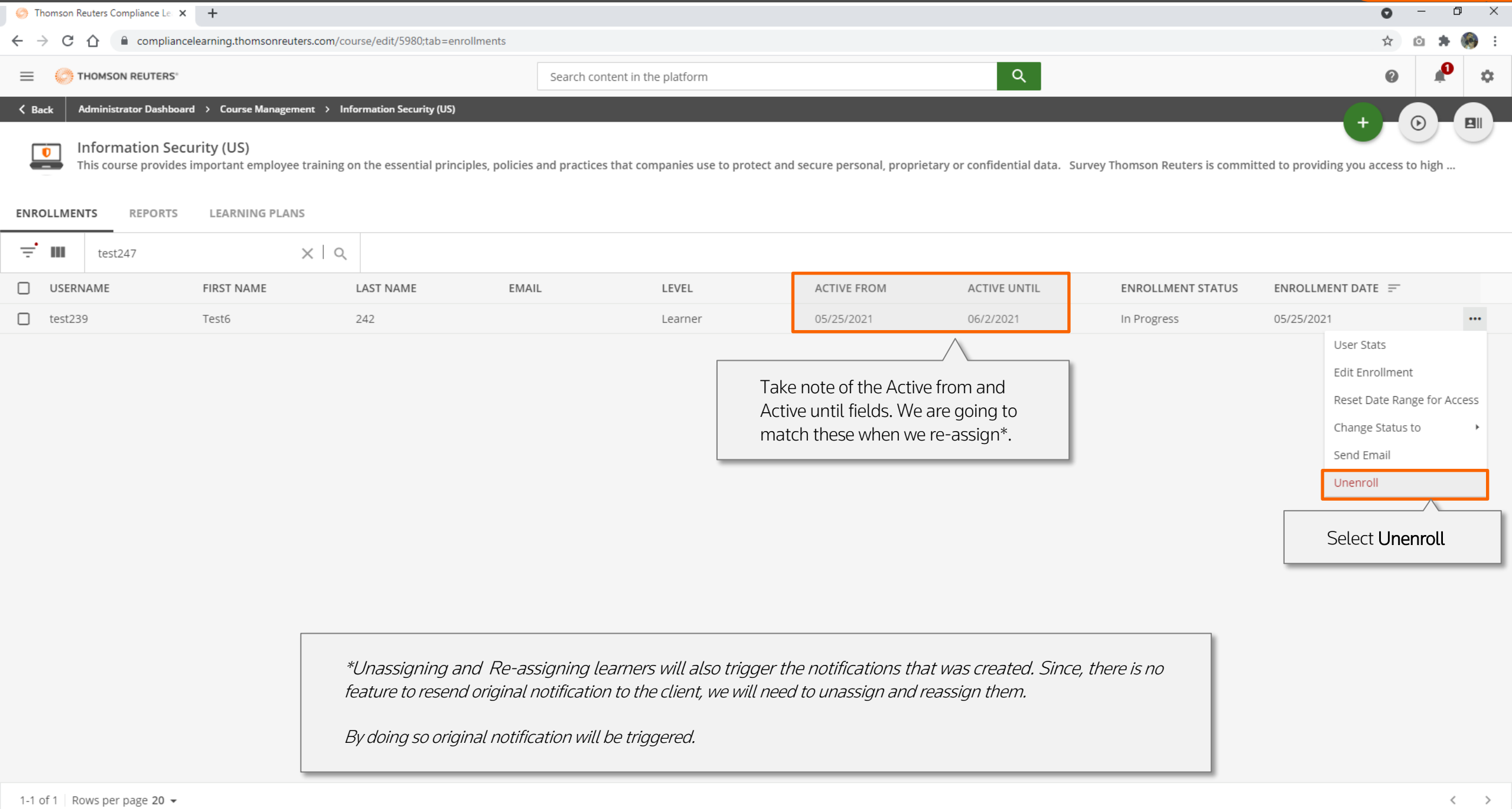
Un-assigning A User (2)

Return to Menu



Un-assigning A User (3)

Return to Menu



Take note of the Active from and Active until fields. We are going to match these when we re-assign*.

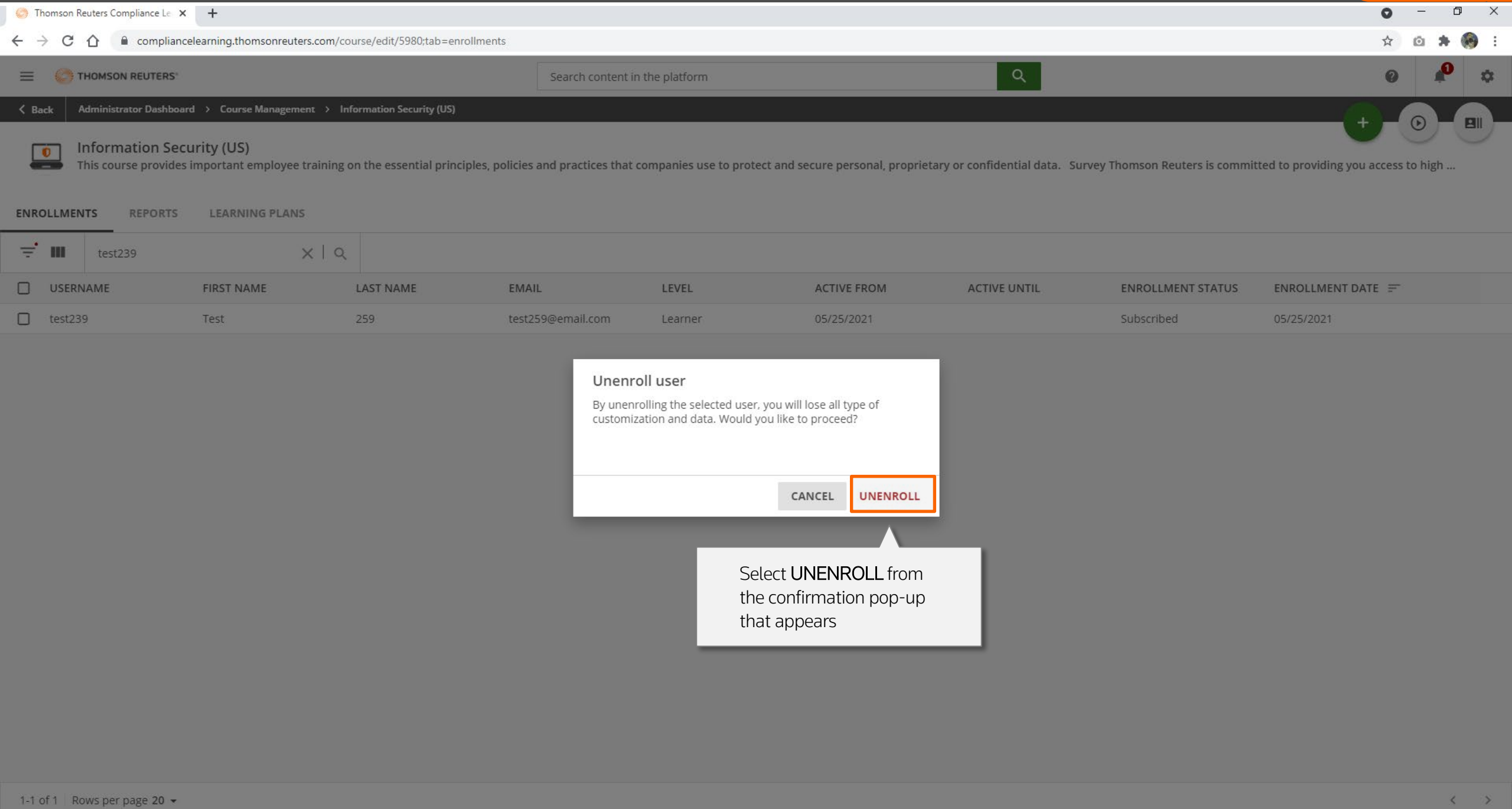
Select **Unenroll**

**Unassigning and Re-assigning learners will also trigger the notifications that was created. Since, there is no feature to resend original notification to the client, we will need to unassign and reassign them.*

By doing so original notification will be triggered.

Un-assigning A User (4)

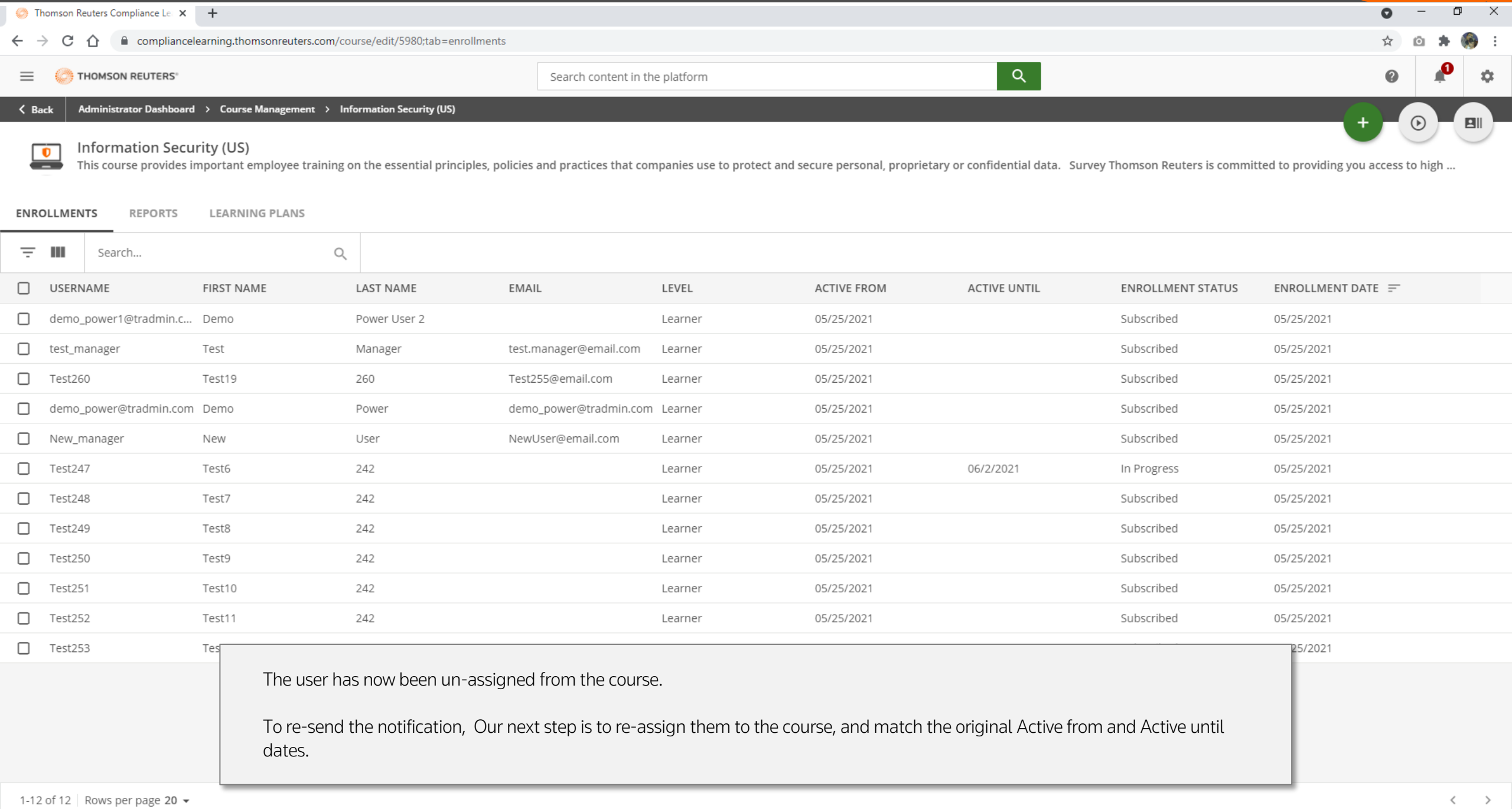
Return to Menu



Select **UNENROLL** from the confirmation pop-up that appears

Un-assigning A User (5)

Return to Menu

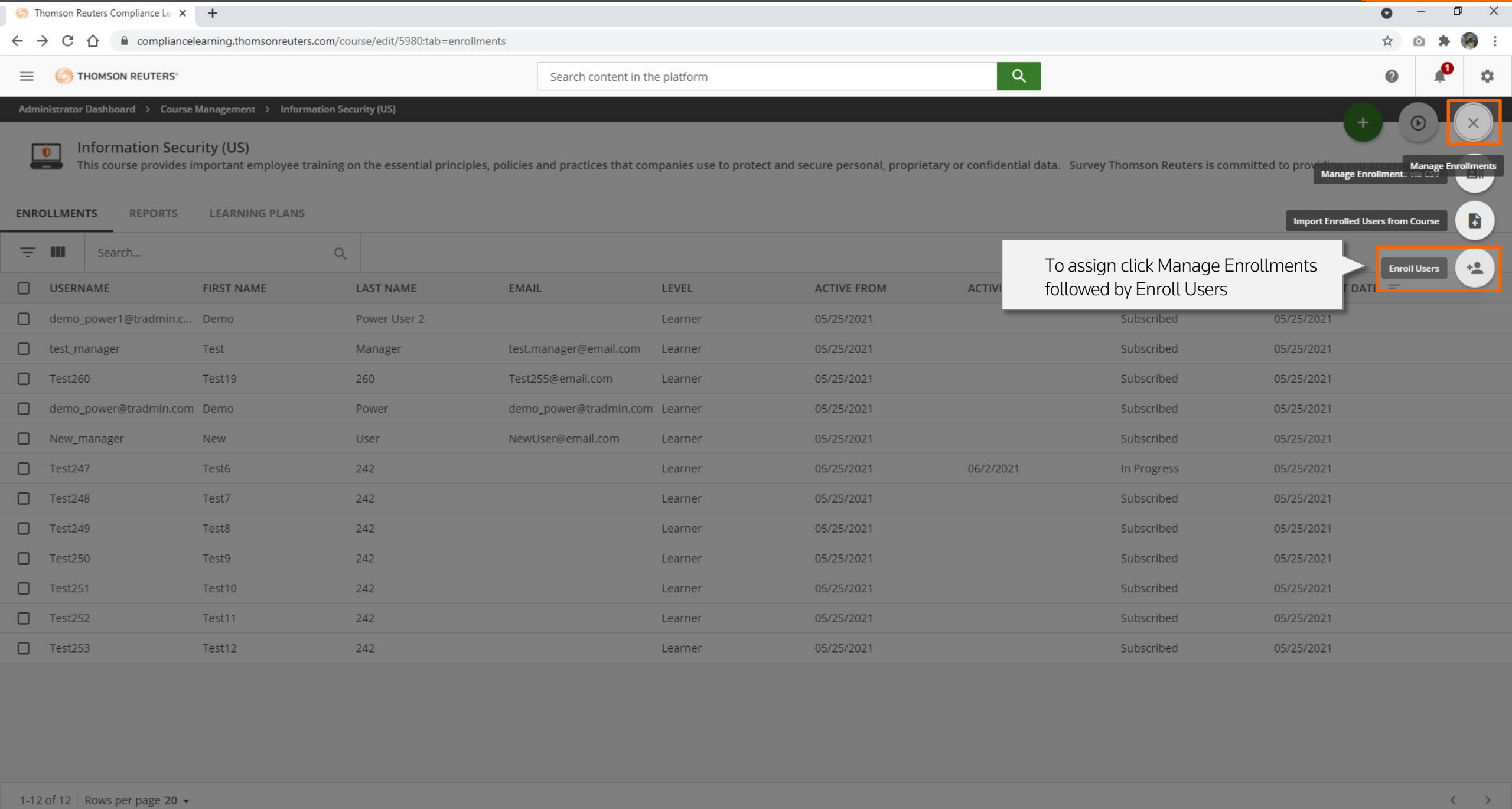


The user has now been un-assigned from the course.

To re-send the notification, Our next step is to re-assign them to the course, and match the original Active from and Active until dates.

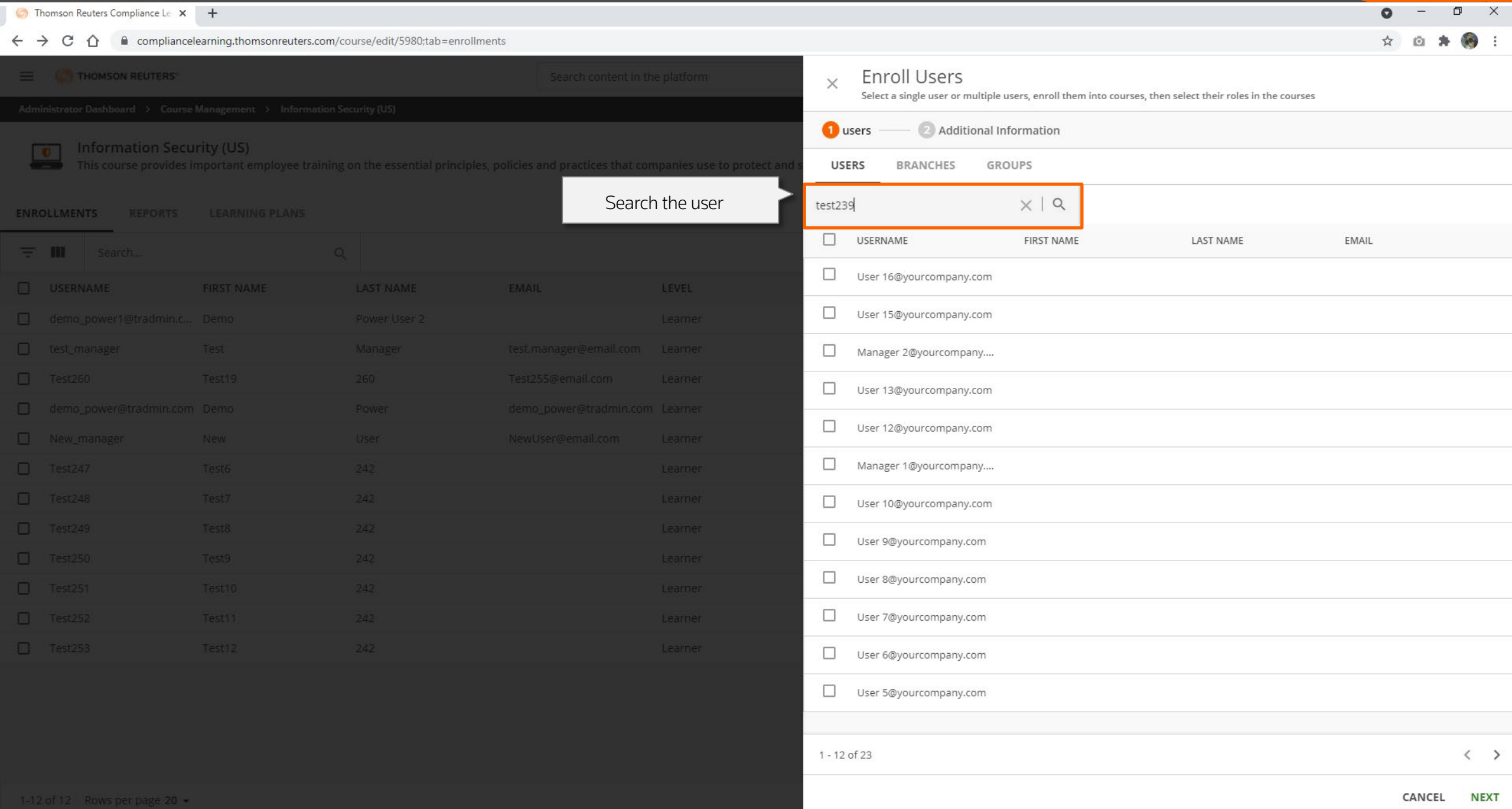
Re-assigning the User (1)

Return to Menu



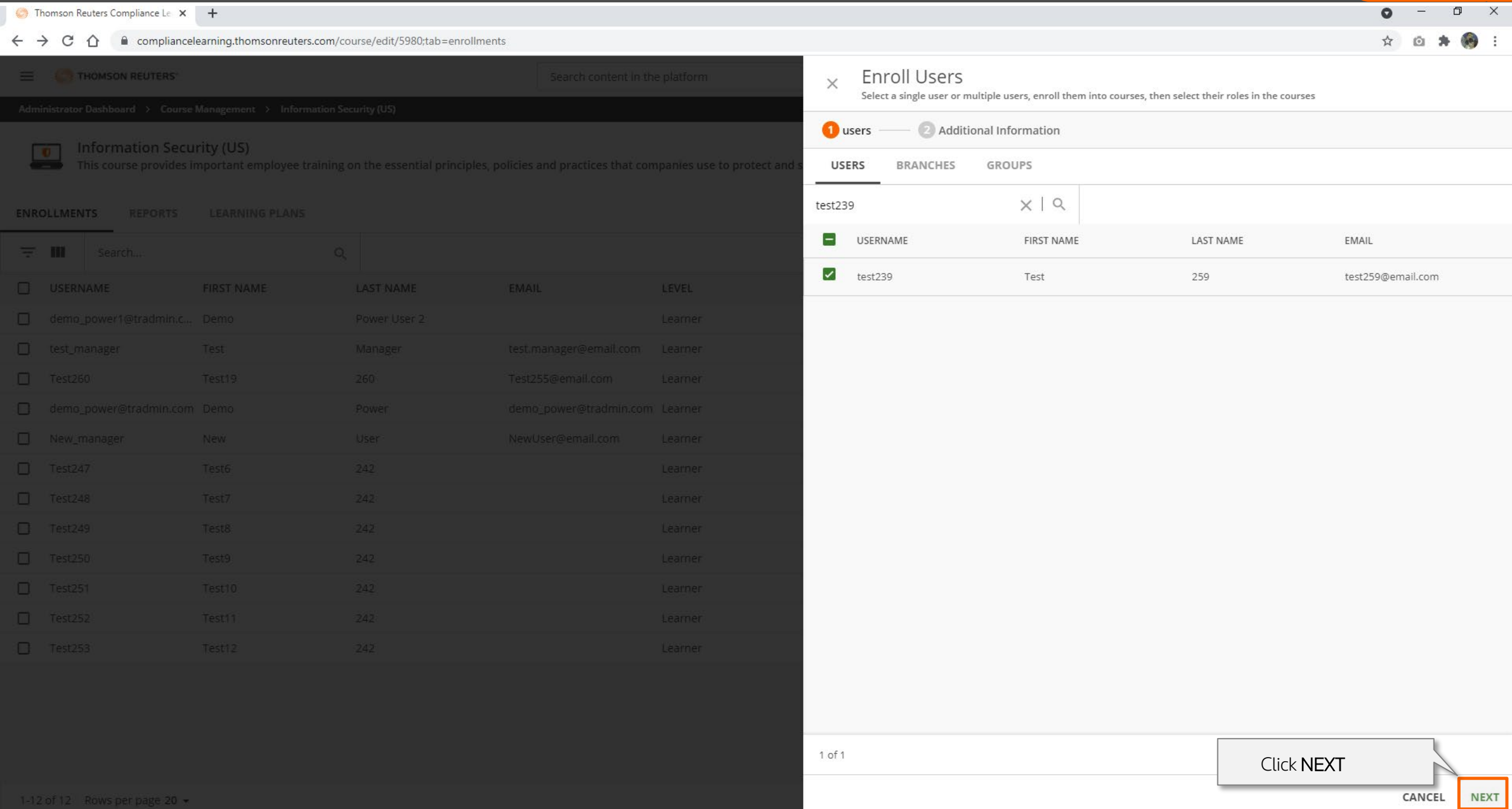
Re-assigning the User (2)

Return to Menu



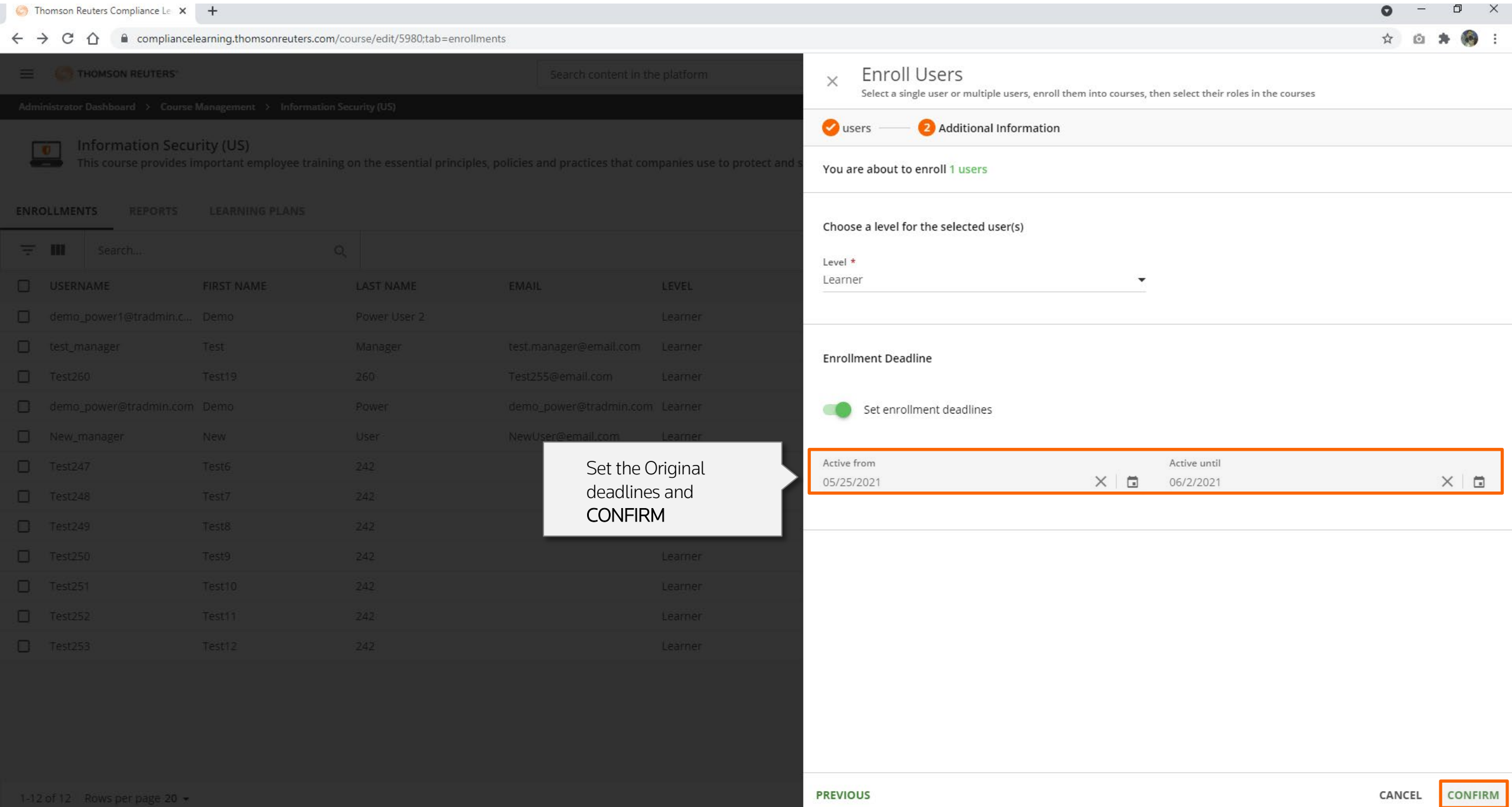
Re-assigning the User (3)

Return to Menu



Re-assigning the User (4)

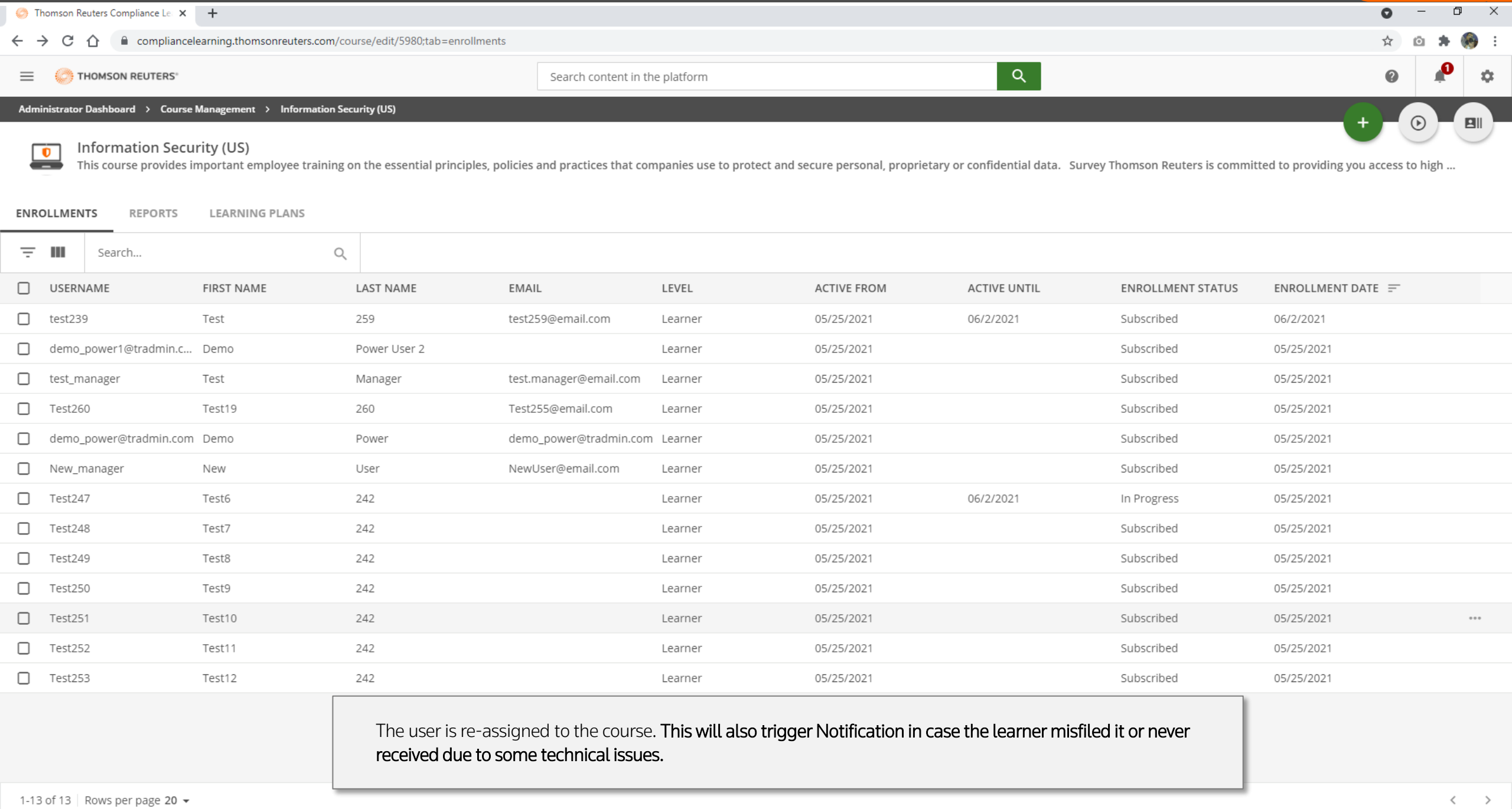
Return to Menu



Set the Original deadlines and CONFIRM

Re-assigning the User (5)

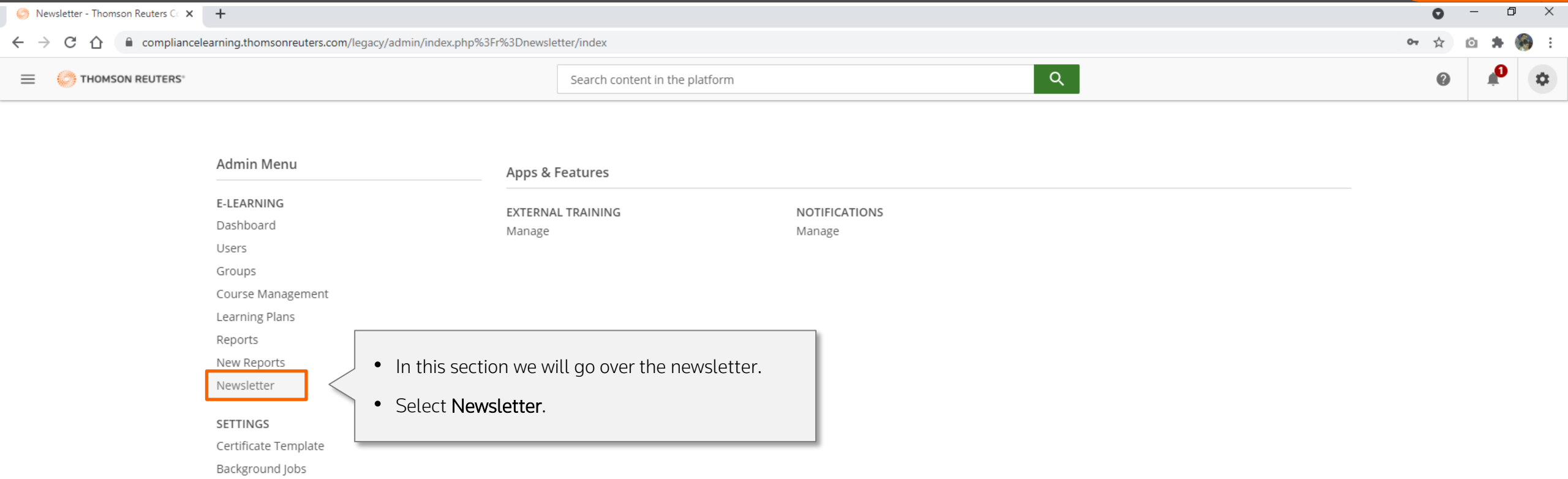
Return to Menu

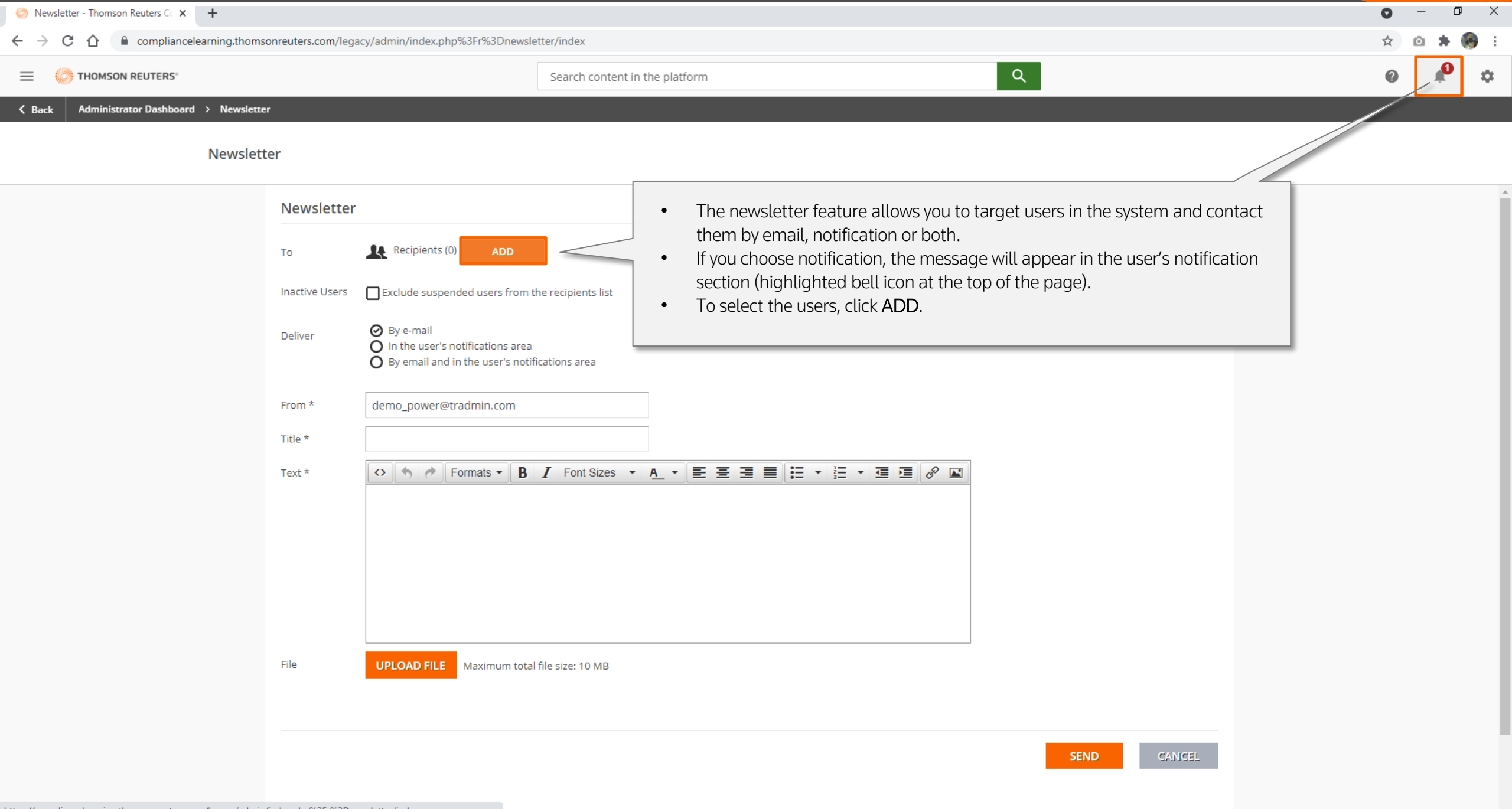


The user is re-assigned to the course. **This will also trigger Notification in case the learner misfiled it or never received due to some technical issues.**

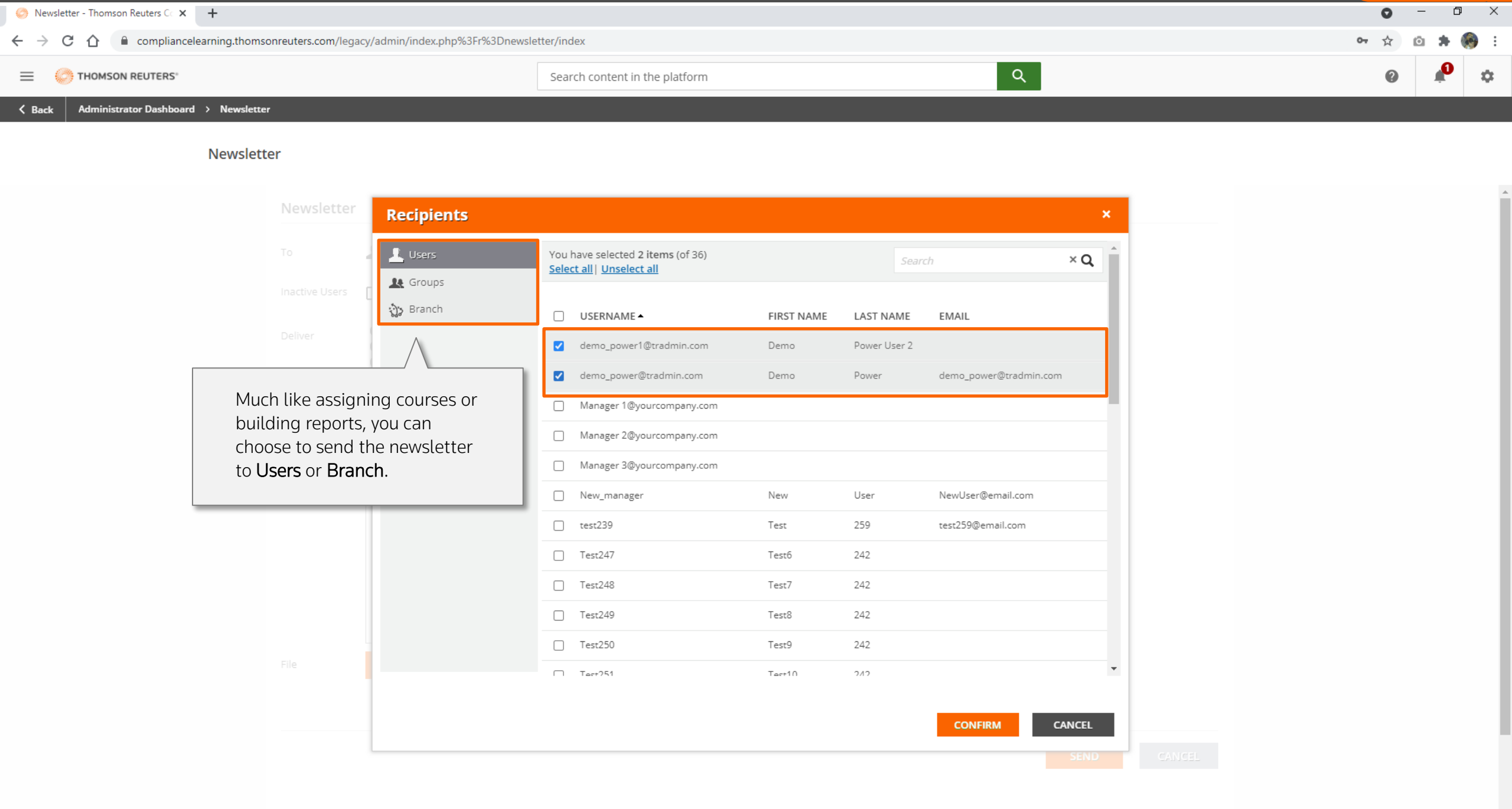
Return to Menu

Managing the Newsletter

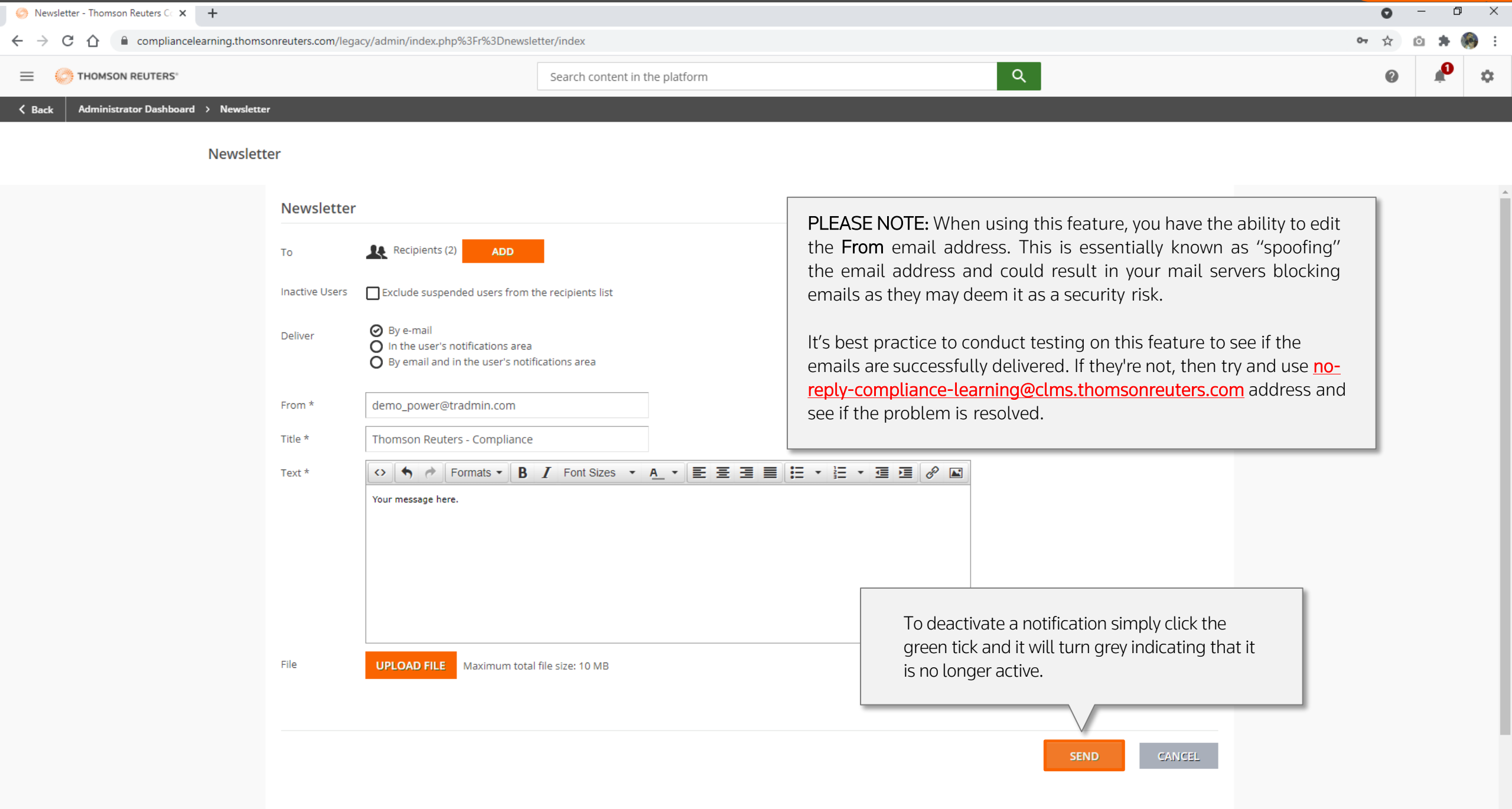

Newsletter - Thomson Reuters C
compliancelearning.thomsonreuters.com/legacy/admin/index.php%3Fr%3Dnewsletter/index
THOMSON REUTERS
Search content in the platform
Admin Menu
E-LEARNING
Dashboard
Users
Groups
Course Management
Learning Plans
Reports
New Reports
Newsletter
SETTINGS
Certificate Template
Background Jobs
Apps & Features
EXTERNAL TRAINING
Manage
NOTIFICATIONS
Manage
In this section we will go over the newsletter.
Select Newsletter.



- The newsletter feature allows you to target users in the system and contact them by email, notification or both.
- If you choose notification, the message will appear in the user's notification section (highlighted bell icon at the top of the page).
- To select the users, click ADD.



Much like assigning courses or building reports, you can choose to send the newsletter to **Users** or **Branch**.

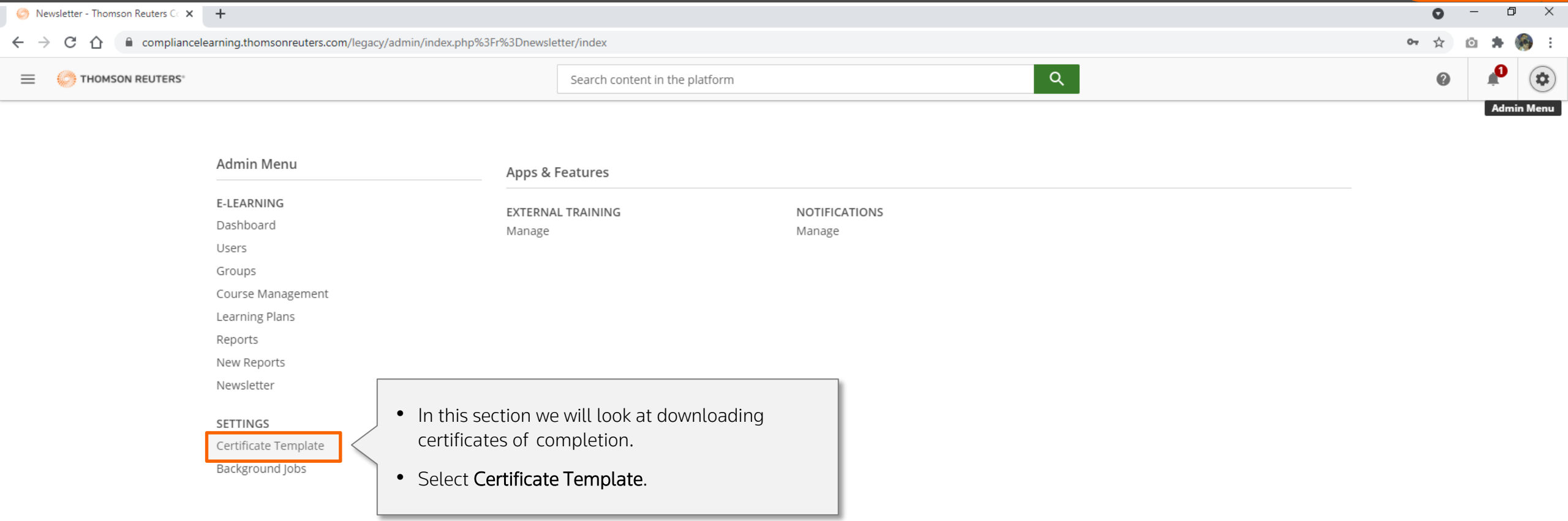


PLEASE NOTE: When using this feature, you have the ability to edit the From email address. This is essentially known as "spoofing" the email address and could result in your mail servers blocking emails as they may deem it as a security risk.

It's best practice to conduct testing on this feature to see if the emails are successfully delivered. If they're not, then try and use no-reply-compliance-learning@clms.thomsonreuters.com address and see if the problem is resolved.

To deactivate a notification simply click the green tick and it will turn grey indicating that it is no longer active.

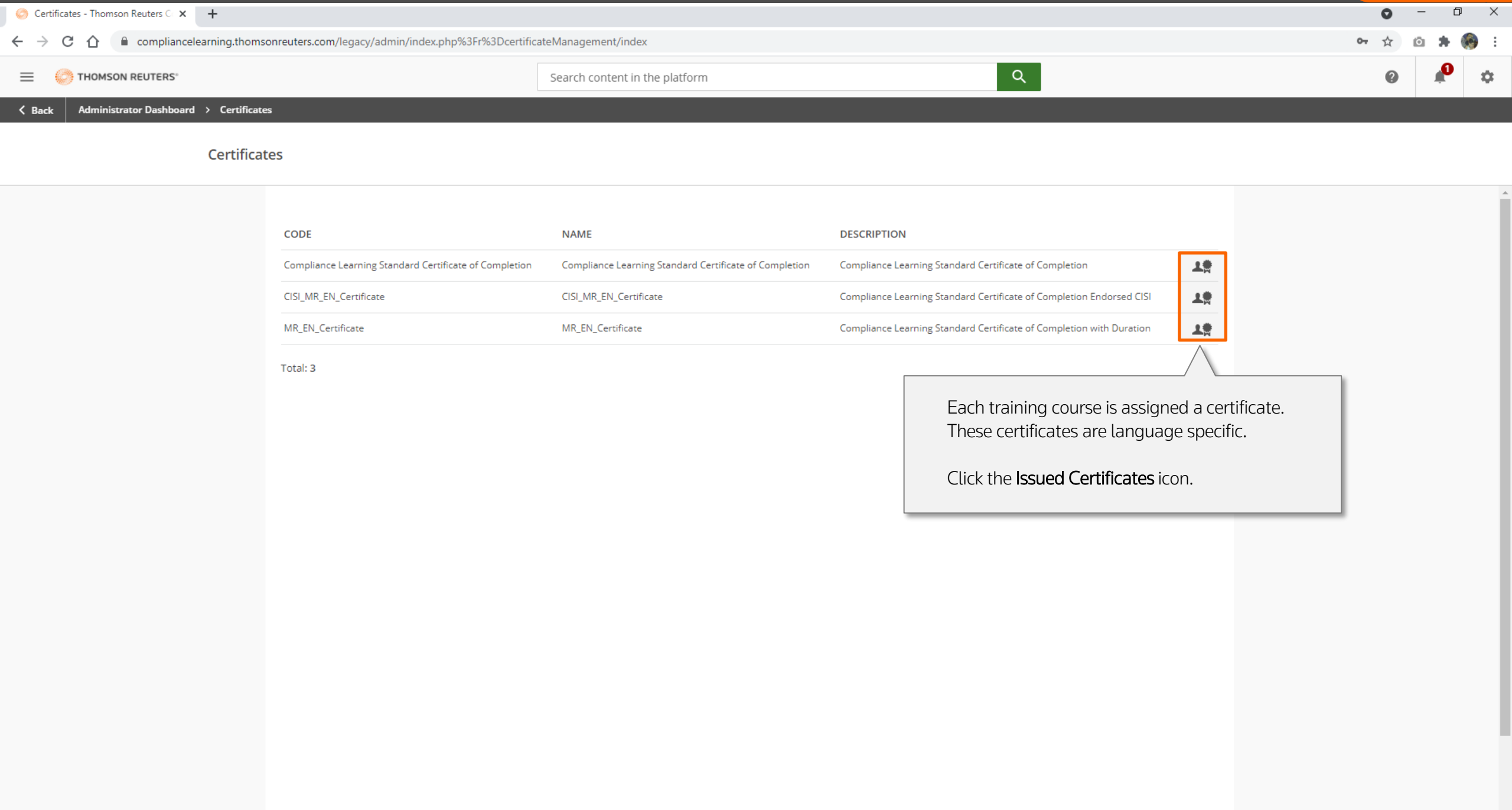
Managing Certificates



- In this section we will look at downloading certificates of completion.
- Select **Certificate Template**.

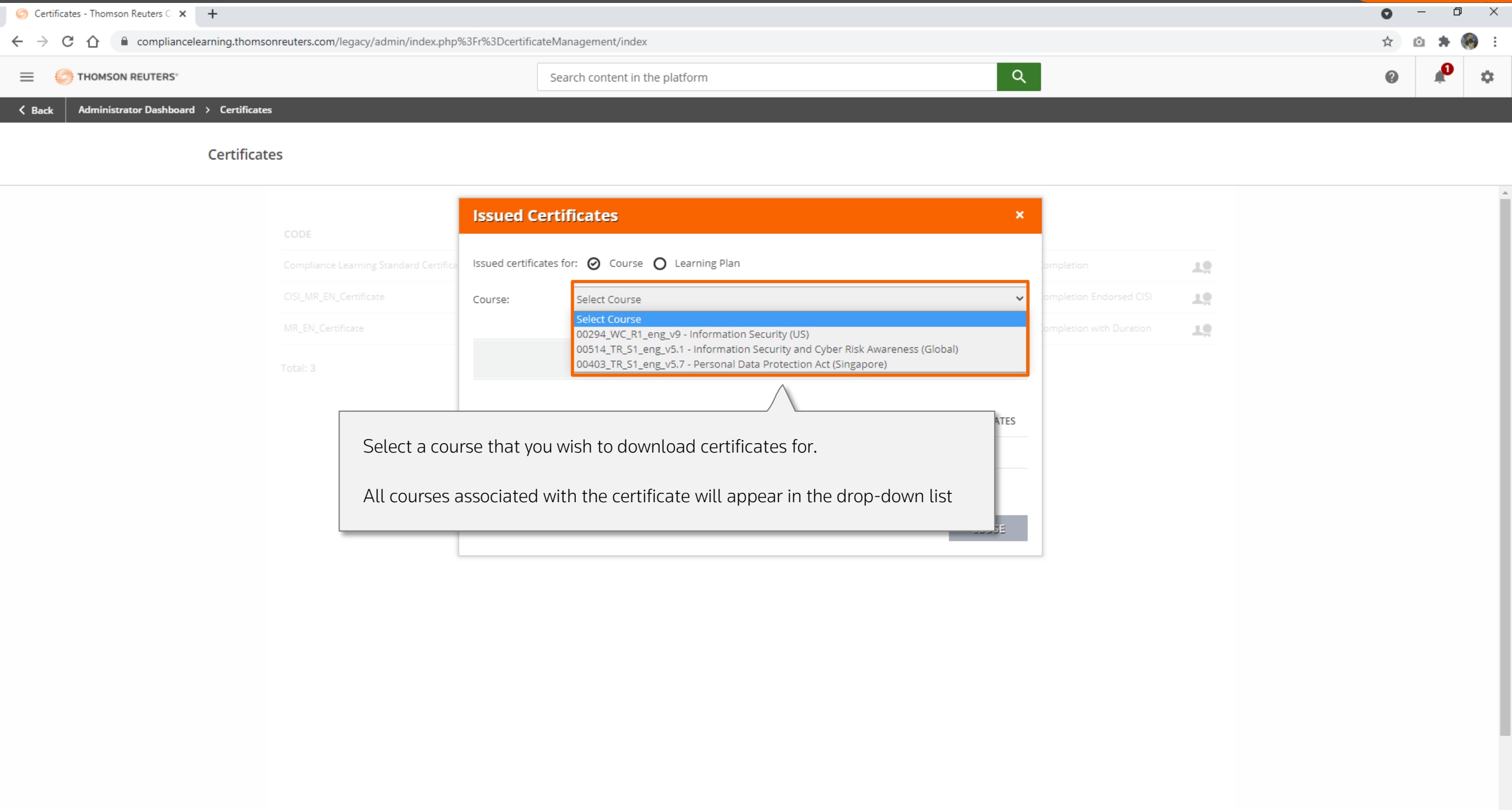
Downloading Certificates (1)

Return to Menu



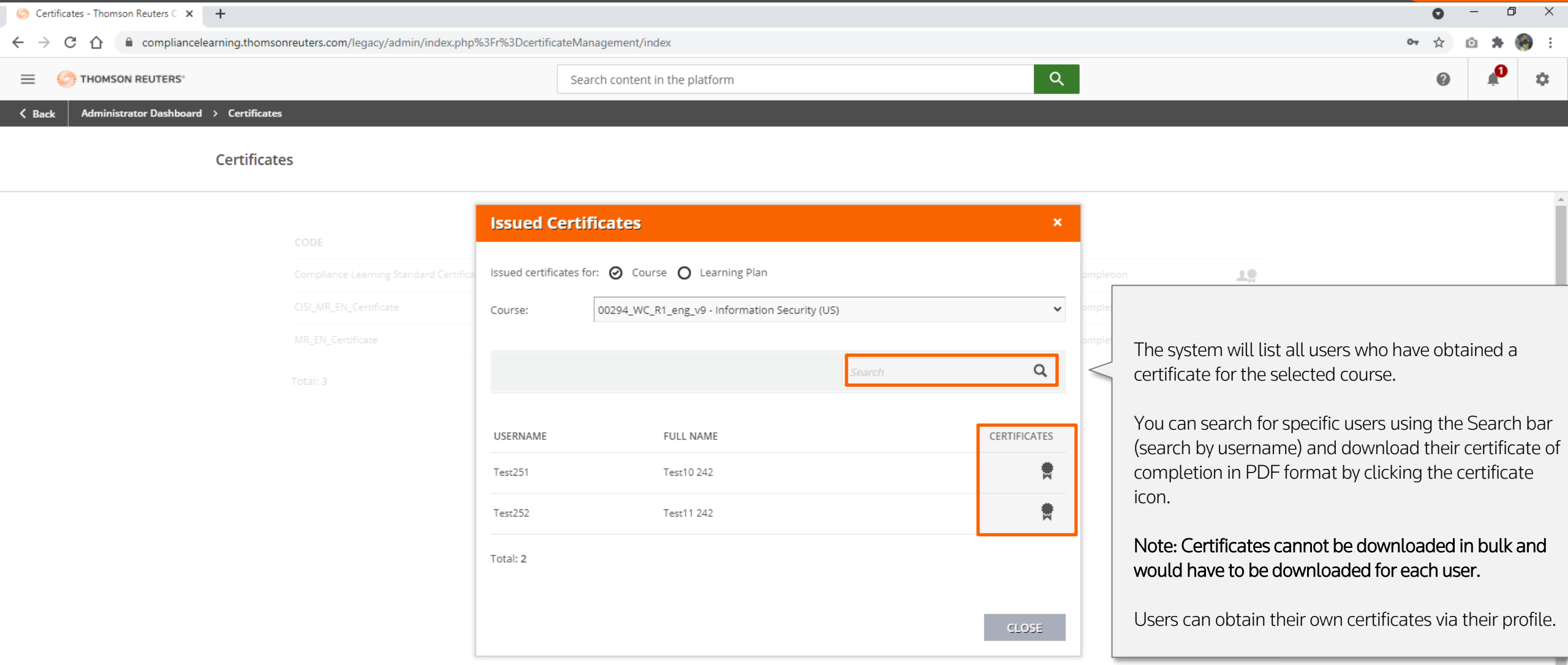
Downloading Certificates (2)

Return to Menu



Downloading Certificates (3)

Return to Menu



The system will list all users who have obtained a certificate for the selected course.

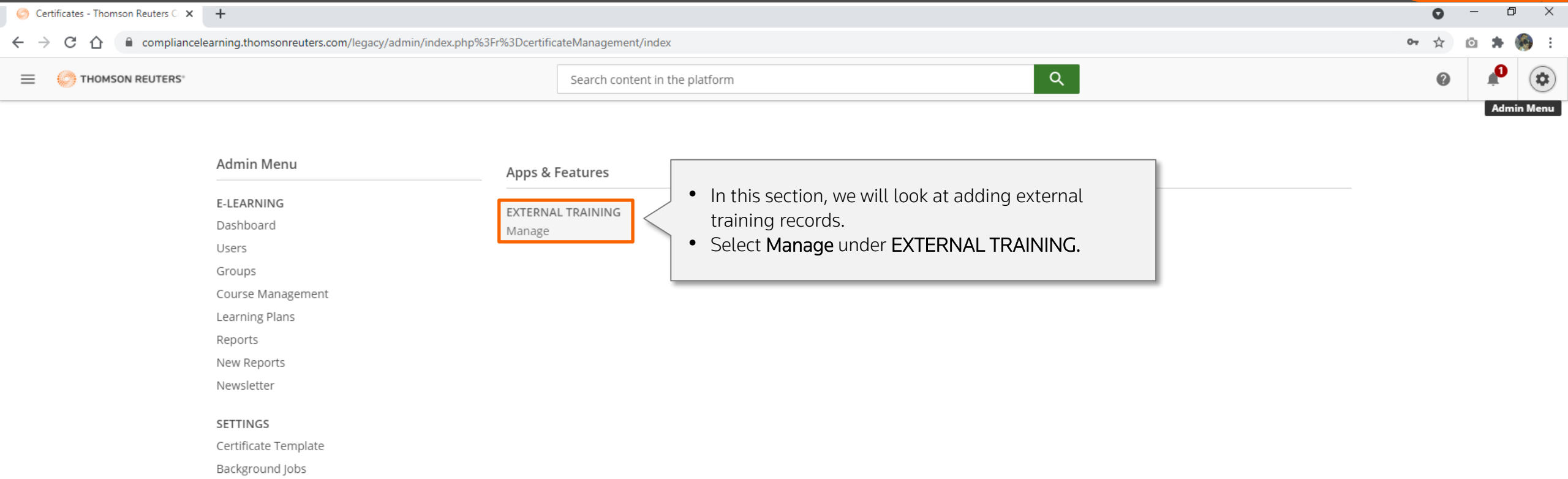
You can search for specific users using the Search bar (search by username) and download their certificate of completion in PDF format by clicking the certificate icon.

Note: Certificates cannot be downloaded in bulk and would have to be downloaded for each user.

Users can obtain their own certificates via their profile.

Return to Menu

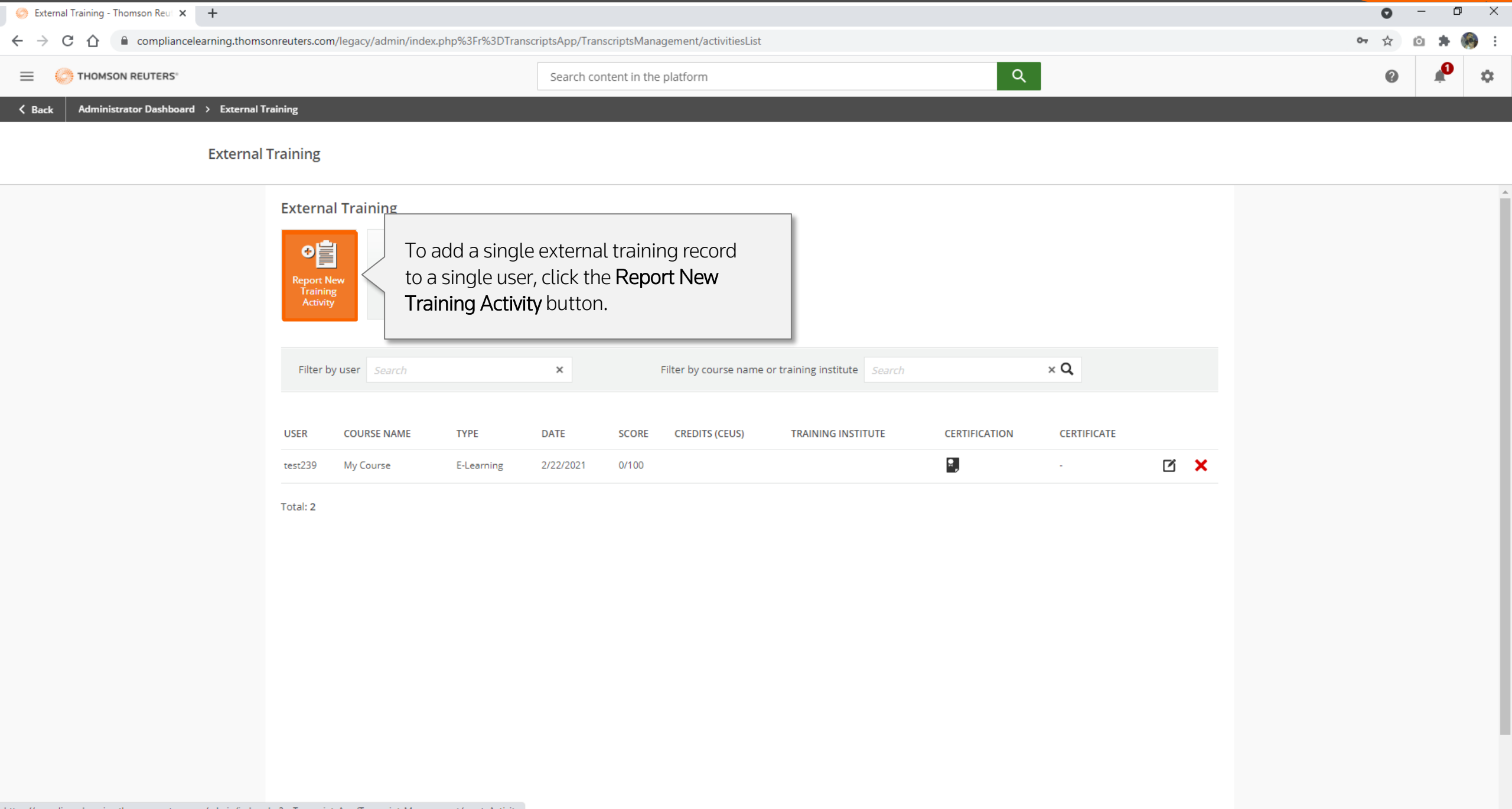
Managing External Training Records



- In this section, we will look at adding external training records.
- Select **Manage** under **EXTERNAL TRAINING**.

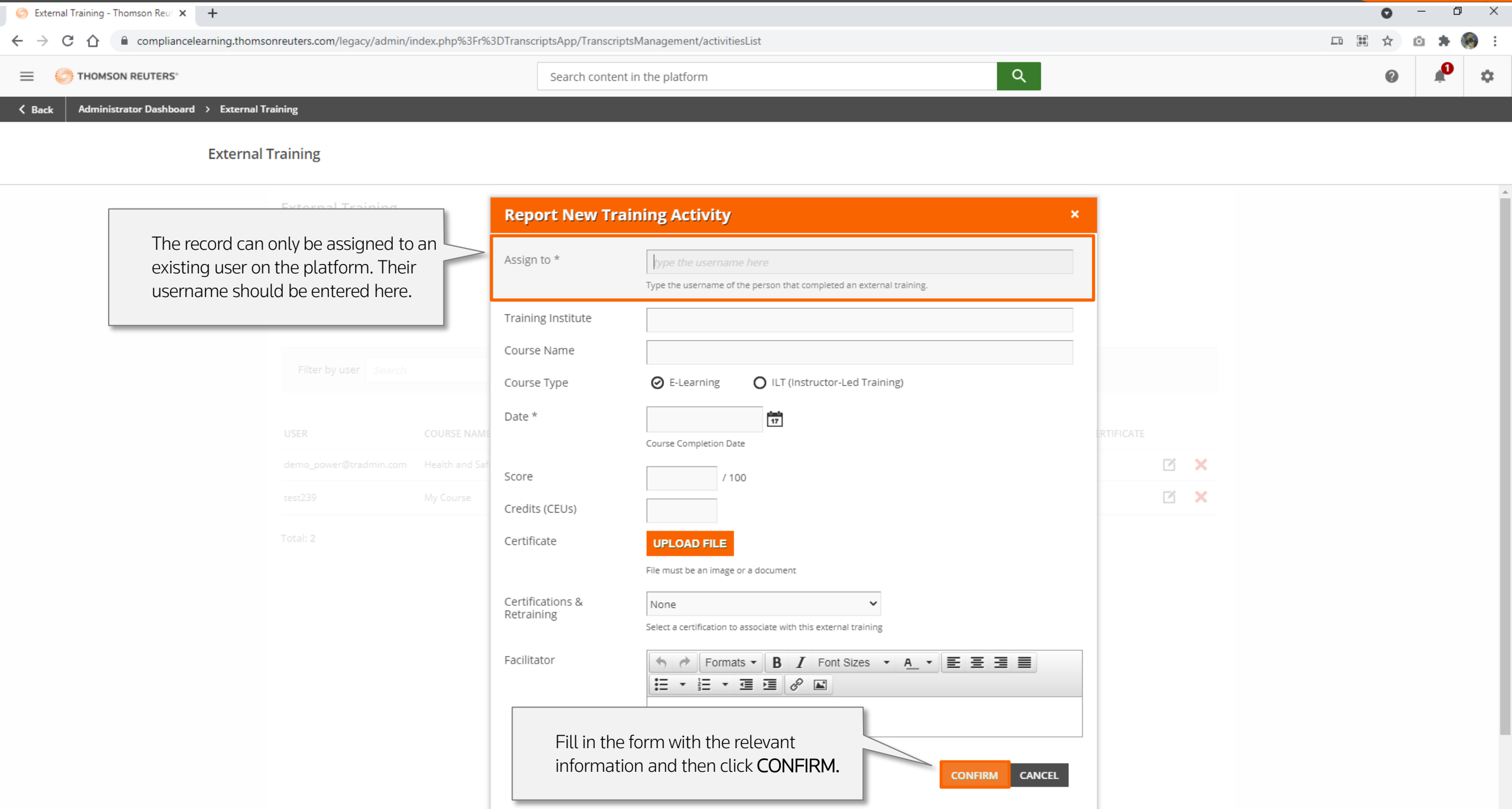
Adding a Single Record (1)

Return to Menu



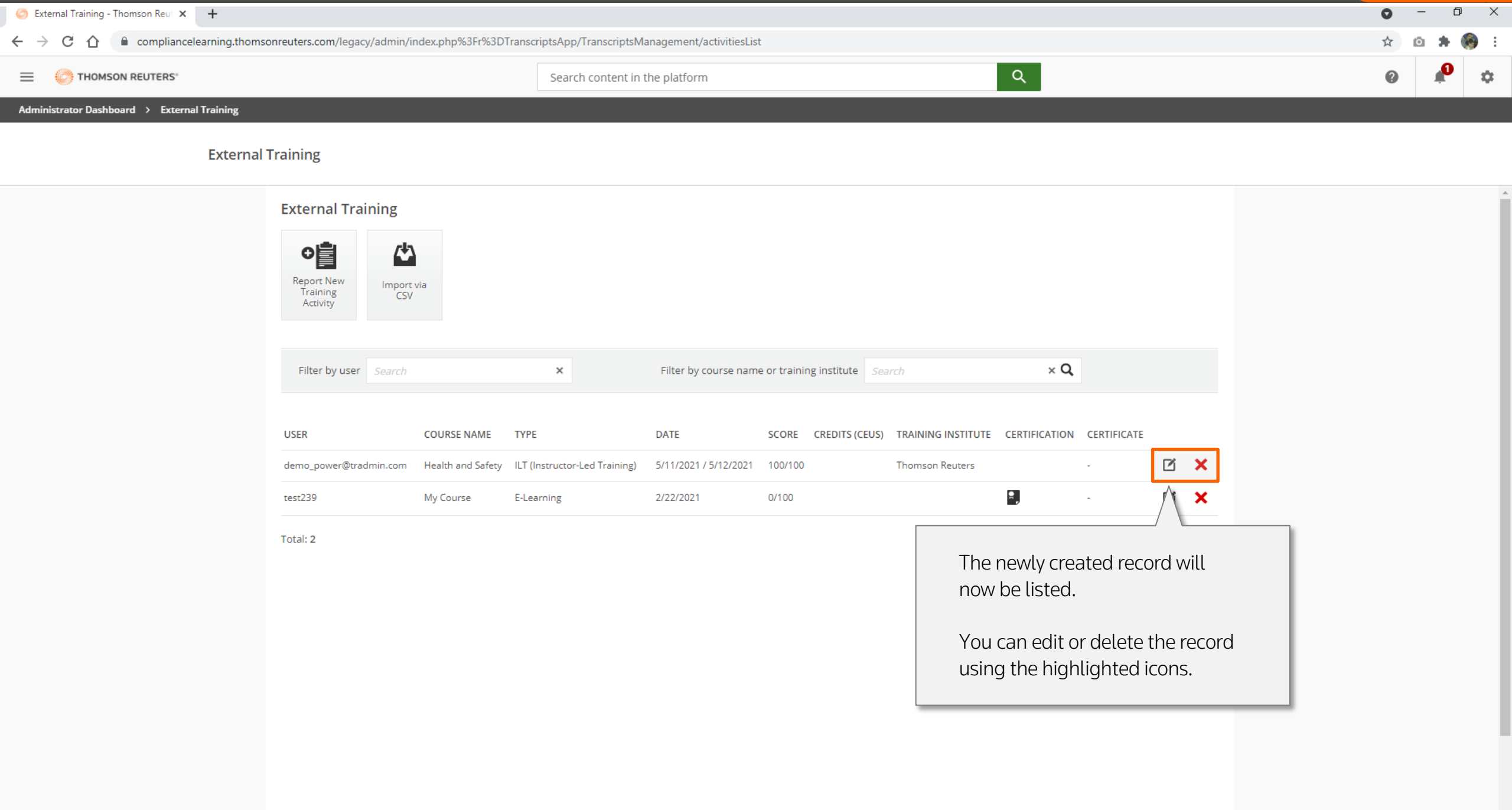
Adding a Single Record (2)

Return to Menu



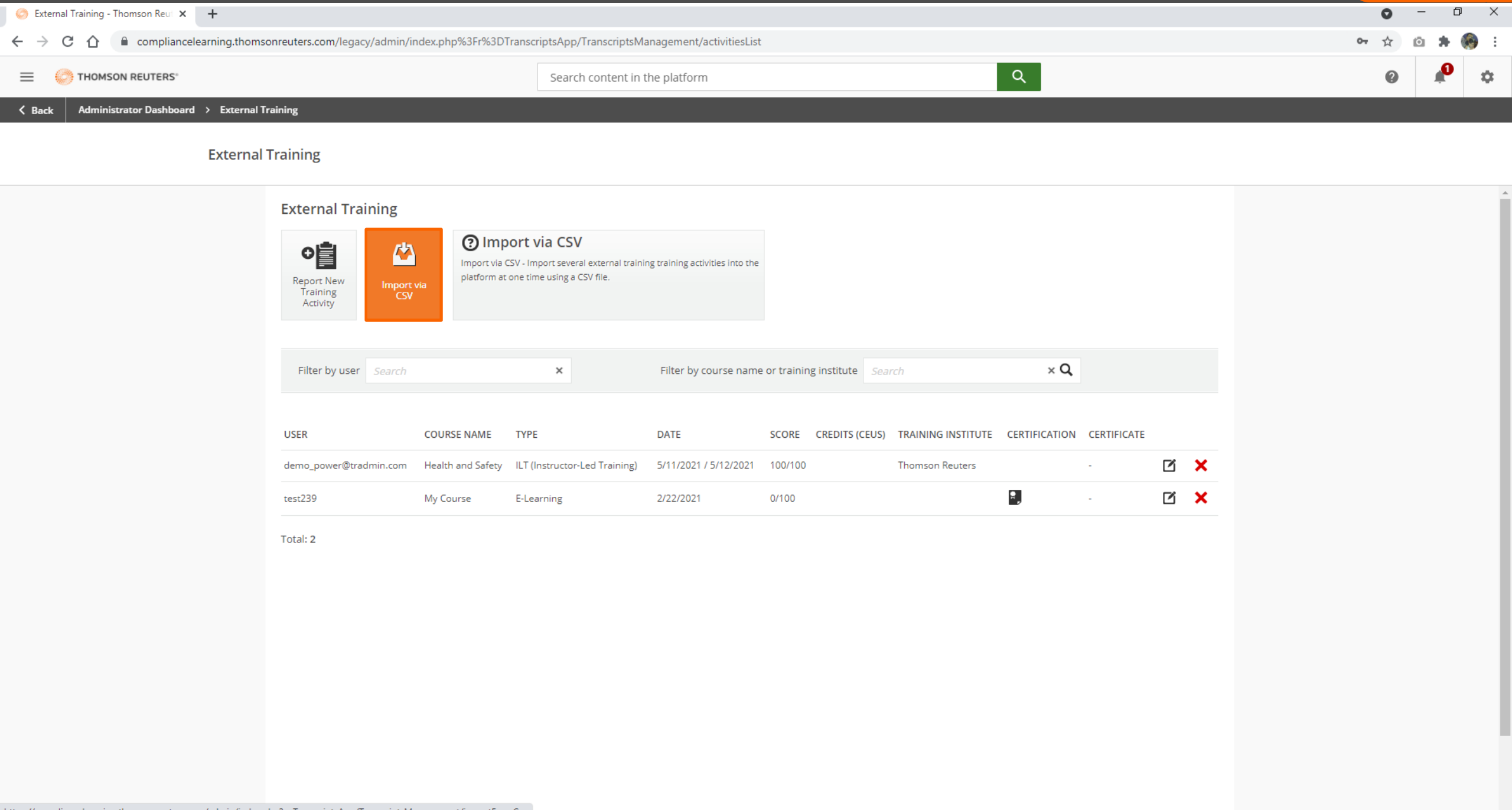
Editing or Deleting Records

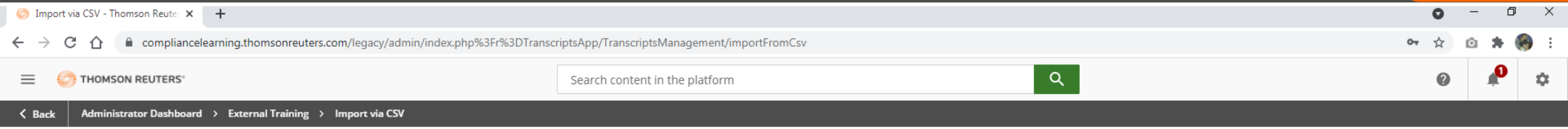
Return to Menu



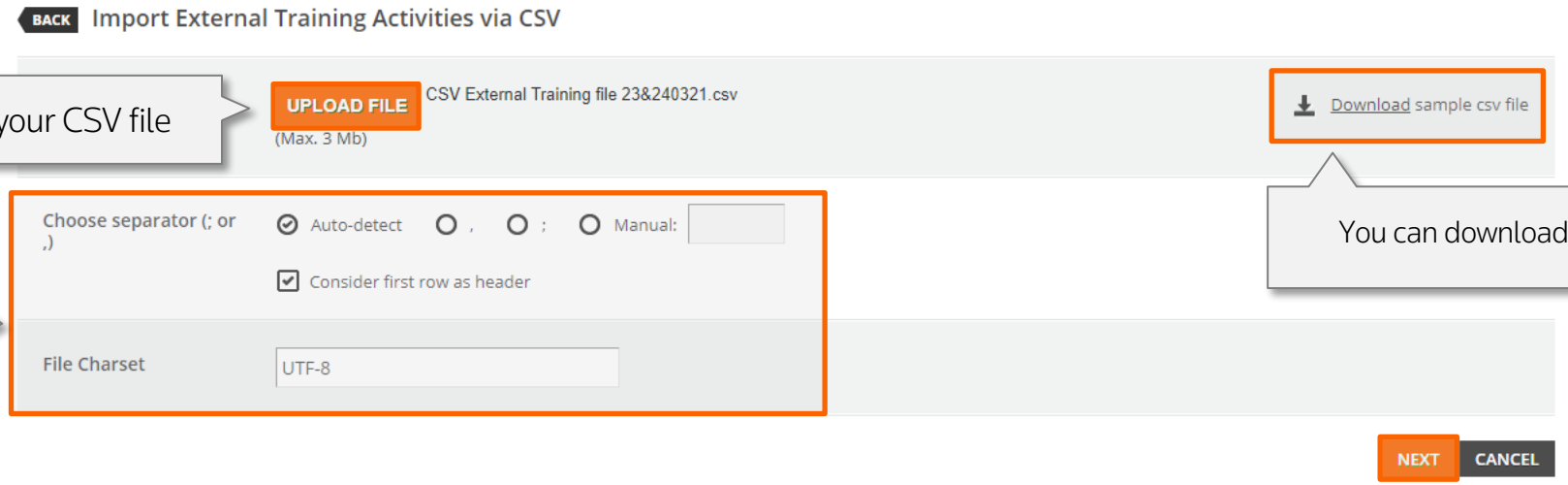
The newly created record will now be listed.

You can edit or delete the record using the highlighted icons.


External Training - Thomson Reu
compliancelearning.thomsonreuters.com/legacy/admin/index.php%3Fr%3DTranscriptsApp/TranscriptsManagement/activitiesList
THOMSON REUTERS
Search content in the platform
Back
Administrator Dashboard
External Training
External Training
External Training
Report New Training Activity
Import via CSV
Import via CSV
Import via CSV - Import several external training training activities into the platform at one time using a CSV file.
Filter by user
Search
Filter by course name or training institute
Search
USER
COURSE NAME
TYPE
DATE
SCORE
CREDITS (CEUS)
TRAINING INSTITUTE
CERTIFICATION
CERTIFICATE
demo_power@tradmin.com
Health and Safety
ILT (Instructor-Led Training)
5/11/2021 / 5/12/2021
100/100
Thomson Reuters
-
test239
My Course
E-Learning
2/22/2021
0/100
-
Total: 2



Import via CSV



Upload your CSV file

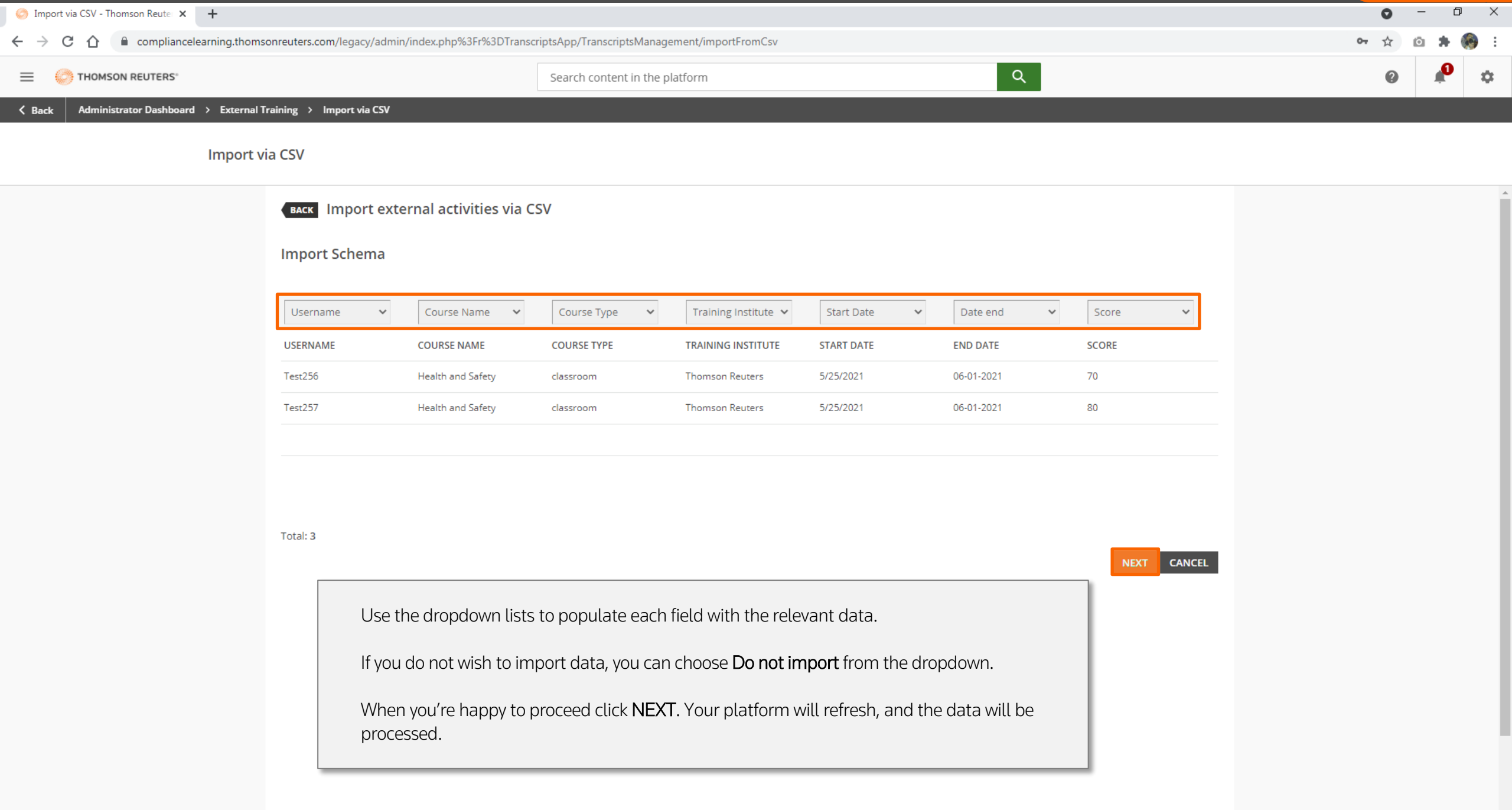
You can download a sample file.

Change the parameters as required. It is recommend that you do not change the default parameters.

When you're happy to proceed, click **NEXT**.

	A	B	C	D	E	F	G	H
1	USERNAME	COURSE NAME	COURSE TYPE	TRAINING INSTITUTE	START DATE	END DATE	SCORE	CREDITS
2	chris.green@email.com	Health and Safety	Classroom	Thomson Reuters Induction	18/01/2019	18/01/2019	100	
3	amy.kerry@email.com	Health and Safety	Classroom	Thomson Reuters Induction	18/01/2019	18/01/2019	100	

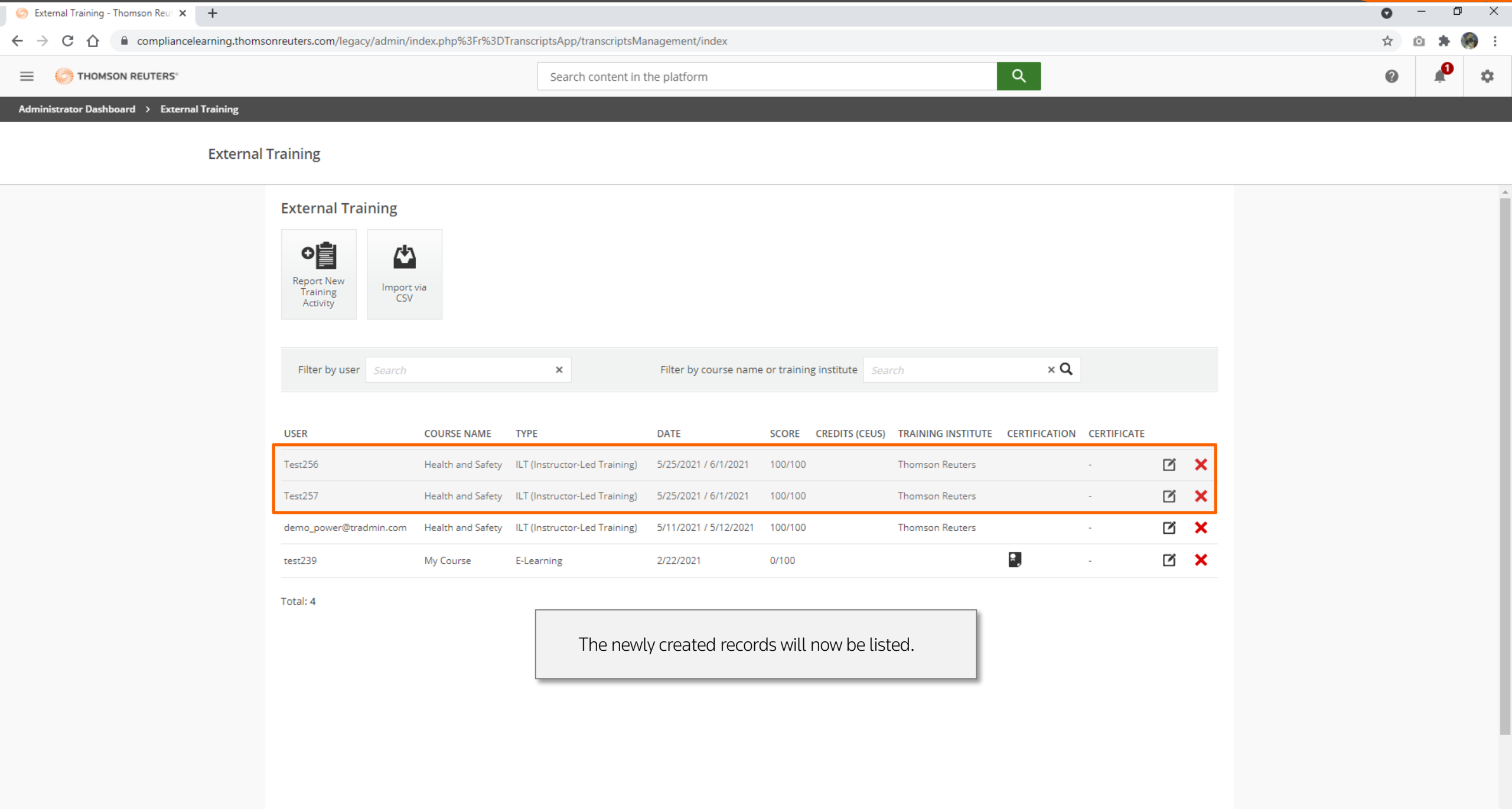
An example of a populated CSV file is shown.



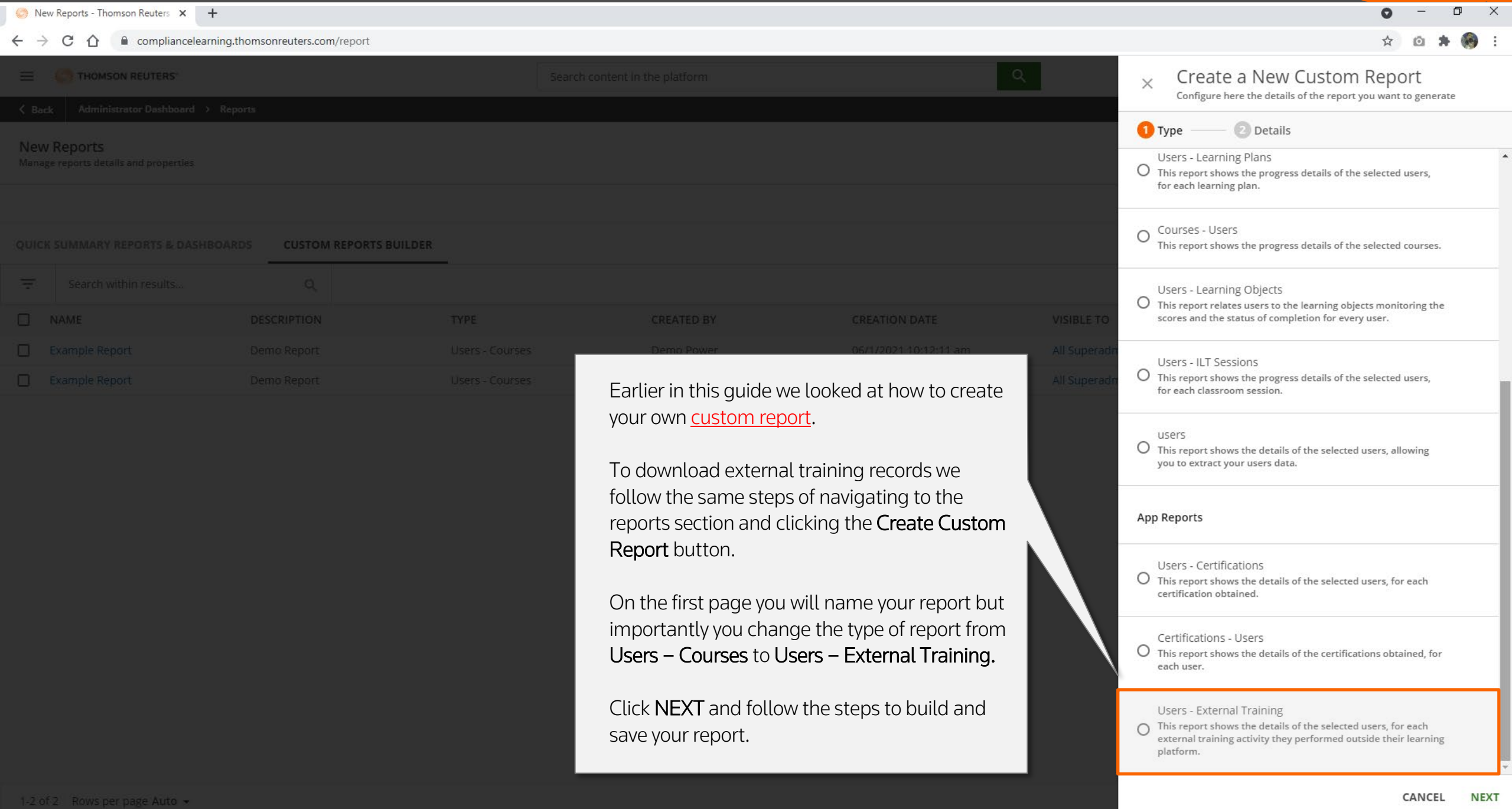
Use the dropdown lists to populate each field with the relevant data.

If you do not wish to import data, you can choose **Do not import** from the dropdown.

When you're happy to proceed click **NEXT**. Your platform will refresh, and the data will be processed.



The newly created records will now be listed.



Earlier in this guide we looked at how to create your own custom report.

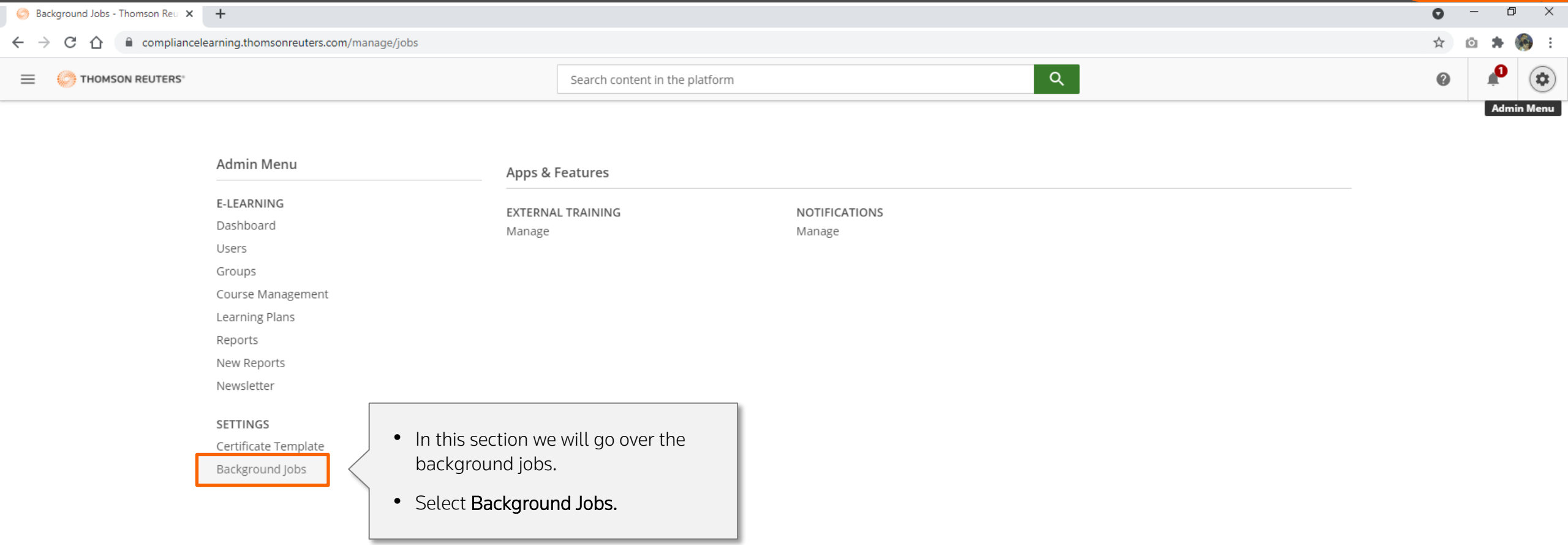
To download external training records we follow the same steps of navigating to the reports section and clicking the **Create Custom Report** button.

On the first page you will name your report but importantly you change the type of report from **Users – Courses** to **Users – External Training.**

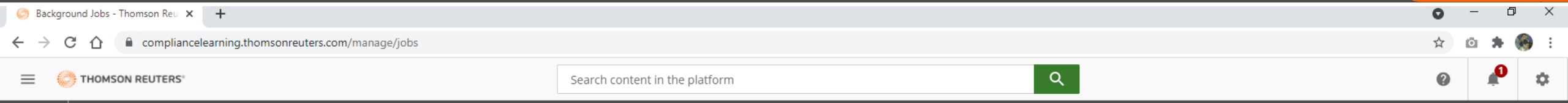
Click **NEXT** and follow the steps to build and save your report.

Return to Menu

Background Jobs



- In this section we will go over the background jobs.
- Select **Background Jobs.**



Background Jobs

Start importer task
Started by Demo Power on 05/27/2021 08:45:06 am
Completed (14 errors) Download log

Extraction for report Example Report
Started by Demo Power on 05/27/2021 08:00:54 am
Completed (0 errors) Download file

Start importer task
Started by Demo Power on 05/25/2021 11:44:57 am
Completed (5 errors) Download log

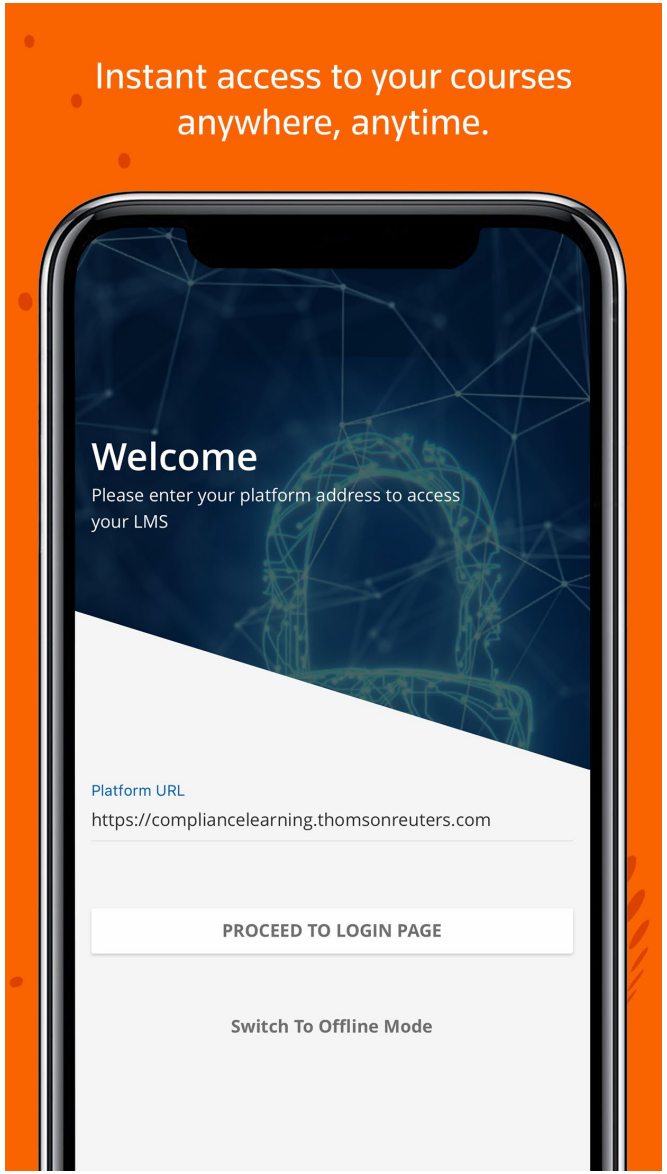
Massive Enrollment of Users into Courses - 5/25/2021
Started by Demo Power on 05/25/2021 08:54:10 am
Completed (4 errors) Download log

Background Jobs
This option displays a list of jobs running in the background.

An example would be a large import of users that may take a few minutes.

Return to Menu

Thomson Reuters CLMS Mobile App



- The Thomson Reuters **CLMS Mobile App** lets you access Compliance Learning Manager directly from your mobile phones.
- The Thomson Reuters CLMS App is available for both Apple and Android smartphones. You can download the app by searching for "**Thomson Reuters CLMS**" in the Apple Store or in Google Play Store.
- Please note that the mobile app does not have admin functionality. For performing admin related tasks, administrators will need to access Compliance Learner Manager via desktop browsers.
- If you are an existing Single Sign On (SSO) customer please talk to your account manager for enabling courses on the mobile app.

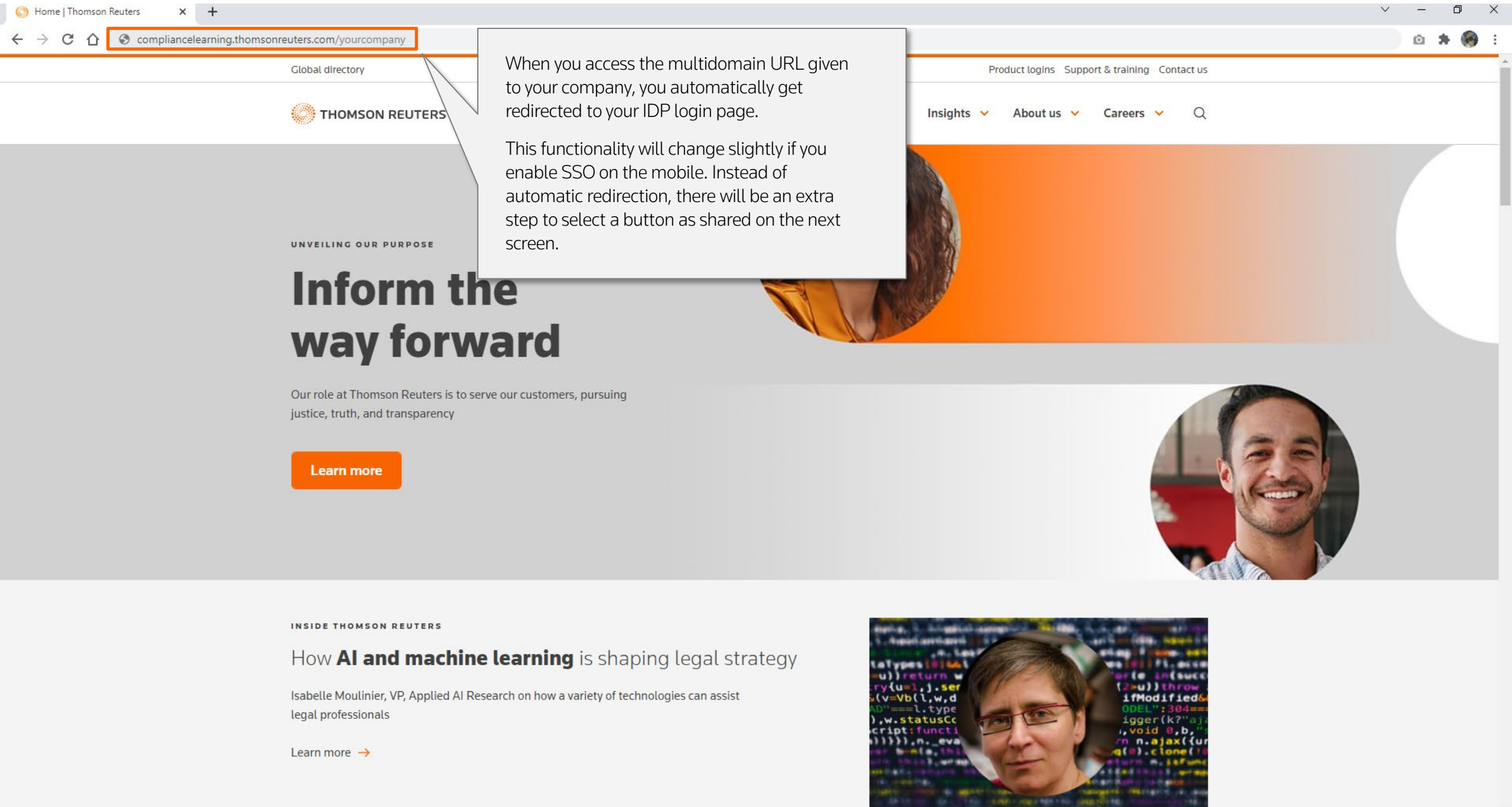
For more information on the features of the app, please access the user guide.

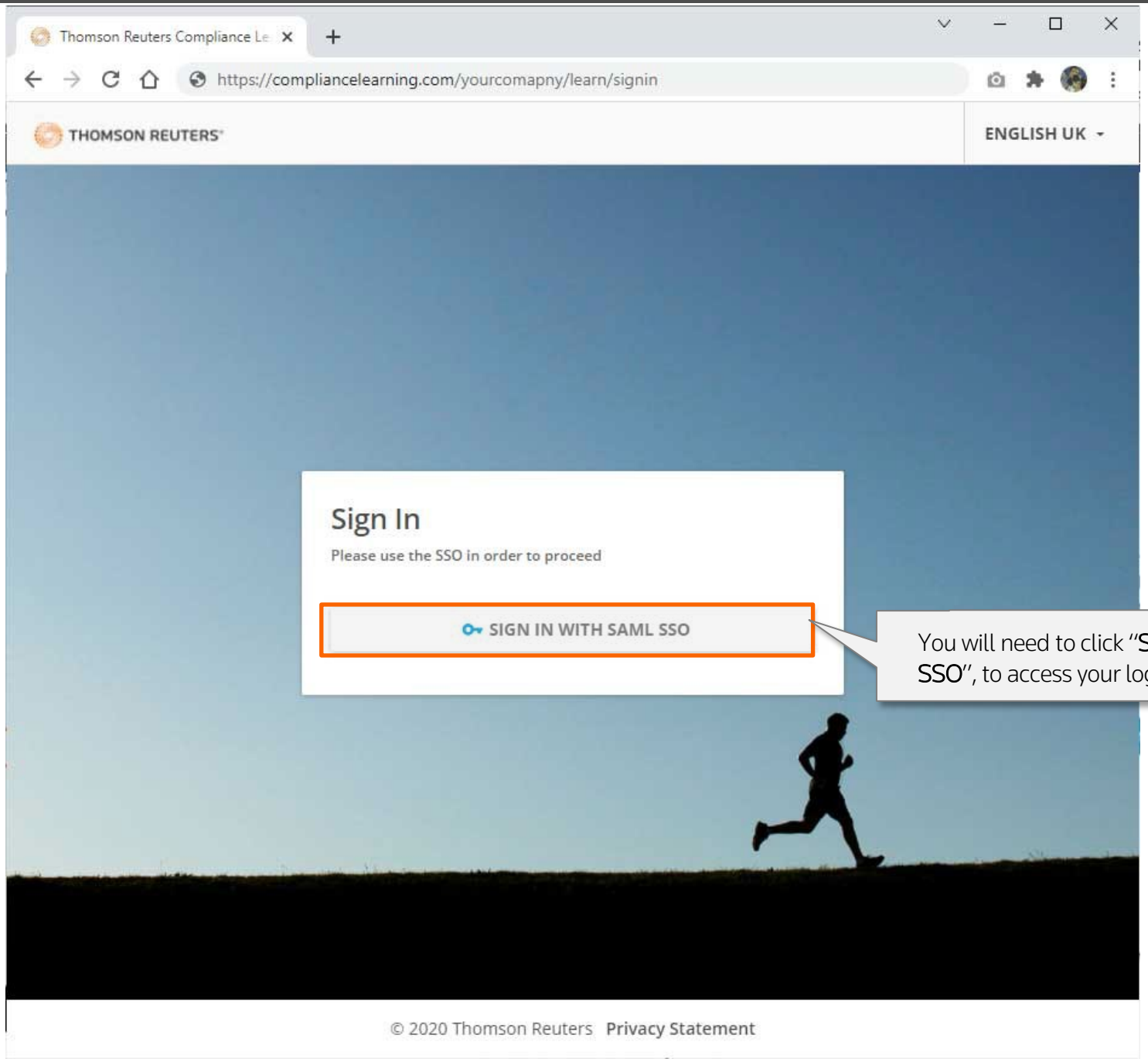
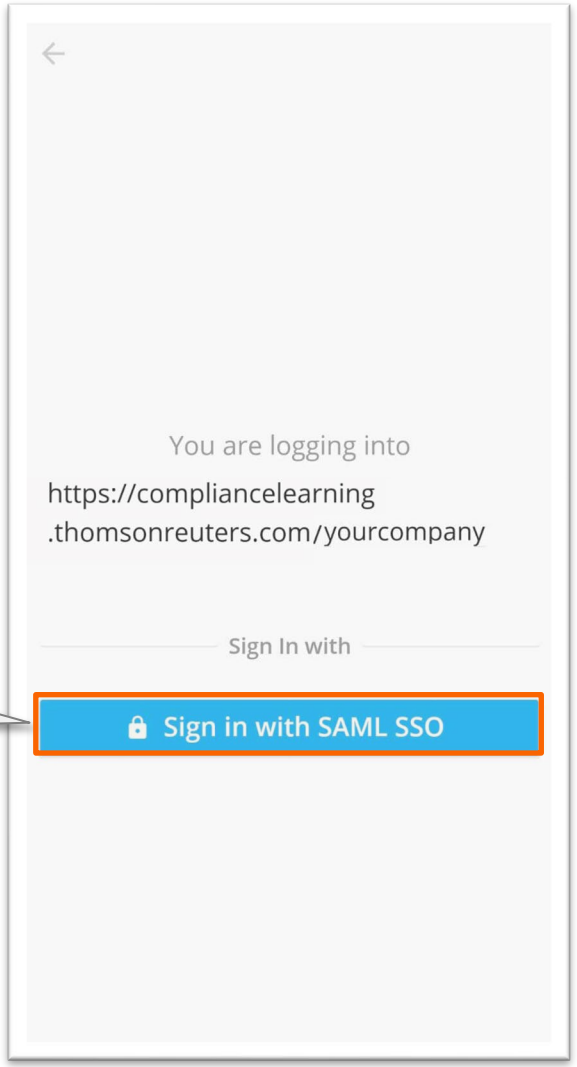
Impact of Enabling SSO on the CLMS Mobile App (1)

Return to Menu

When you access the multidomain URL given to your company, you automatically get redirected to your IDP login page.

This functionality will change slightly if you enable SSO on the mobile. Instead of automatic redirection, there will be an extra step to select a button as shared on the next screen.





You will need to click "**SIGN IN WITH SAML SSO**", to access your login page.