Running Department Halogen Reports

Brief description: To generate a new Report for your Department:

- Go to the Reports home screen
- Choose an existing Report to edit and save with new filters
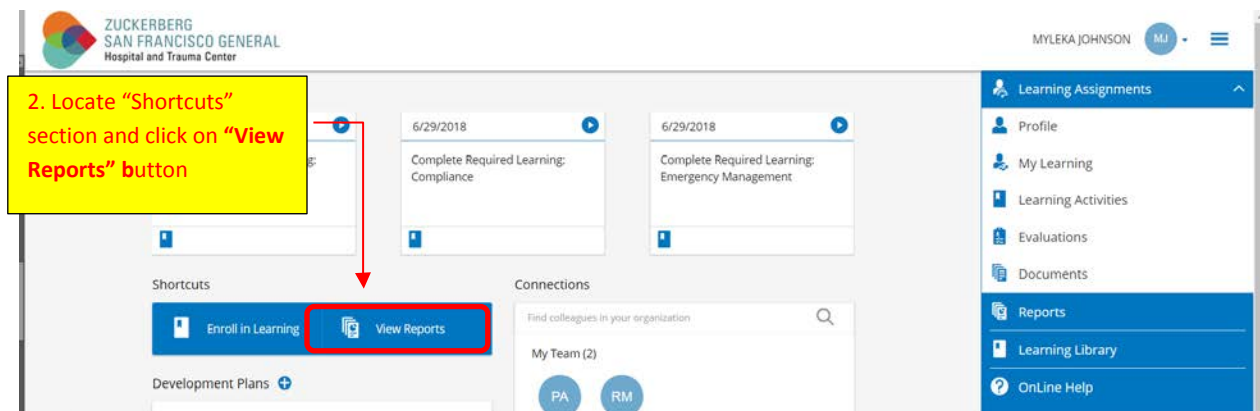- Use this report to generate daily/weekly reports

Report editing steps -

1. Log into Halogen
2. Locate "**Shortcuts**" area (Blue bar/box under "Tasks") and **Click** on **"View Reports"** to go to the Reports home screen.
3. Choose a report from the Reports list within the **"Development" Category** and click the **edit (pencil) icon**; allow report to load (can take a few seconds or minutes).
4. **Editing an existing Report for your Department's use**
   a. Click the "**Save Filters**" icon in the top left corner next to the "Play" button and the *Title and Description* of the Report will pop up.
   b. **Change the Title** of the report to "**2018 (your department name) Report**"; it's not necessary to change the description. Click **SAVE.**
   c. Next, hover over each field below the "Add Filters" area one at-a-time and click the "**X**" to remove each of the previous filters. You should now have no filters under "Add Filters".

   Adding New Filters:

   d. Click Add Filters and in the "**Learning Filters**" list (expand if necessary), find "**Catalog**", and type into the bar, "*2018 Annual Education*". You should then see this phrase, **2018 Annual Education** in your choices. Click on it.
   e. Click Add Filters again and find "**Learning Filters** again, expand the list and choose "**Mandatory Learning**", then click, "**Yes**".
   f. Click Add Filters and go to "**Employee Filters**", expand the list and choose, "**Employee Department**", then click (don't type) on the field and choose "**Advanced Search**". Then in the top field, **Type** your *department name*. You should see several results below in the **Results Box**. Select all of the departments in the box (use Ctl Shift) and click "**Add**".
   g. Click Add Filters again and find "**Learning Activity Filters**, expand the list and choose "**Mandatory Activity**", then click, "**Yes**".
   h. Click Add Filters and find "**Learning Activity Filters**", again and expand the list with the down arrow and click "**Due Date**". You will get a field to the right, choose "**Before**" and open the calendar icon and select **July 1, 2018**. Click "**OK**".
   i. Click the "**Save Filters**" icon at the top of the box.
   j. Click on the "**Reports**" link and return to the reports home screen.
5. **Running your Department's Report**
   a. Locate your Report name on the Reports home screen.

b. Click on the "**Play**" button in the horizontal group of icons to the right of the Report's name and allow the Report to load.

c. Once the Report is loaded, click on the "**CSV Export**" icon (next to the green "Excel X" icon)

d. Choose "**Generate CSV file**" and click "**OK**" and allow the file to load.

e. When CSV file is loaded (circle of dots disappear), **click** the "**CSV Export**" icon again and choose "**Save CSV Export File**".

f. Save this CSV Export File to your computer as an Excel Spreadsheet file. You will need to delete the top several rows in order to filter the columns. You can then filter the raw data in the spreadsheet for your specific needs. You can run new Reports from your "Report" in your Reports list as often as needed.

3. Click the "Edit Report" (pencil) icon

3. Choose a report from the Reports list within the "Development" category

ZUCKERBERG SAN FRANCISCO GENERAL
Hospital and Trauma Center

Home Learning Assignments Learning Catalog Reports Talent View

Reports

	Title	Actions	Category	Author	Last Run
	2018 Dean's Office Test Report Provides details related to results for a learning unit or units including ...		Development	MYLEKA D JOHNSON	2018/05/17
	Individual Employee Halogen Status Provides details related to results for a learning unit or units including ...		Development	JENNIFER R BERKE	2018/05/17
	2017 Annual Training 2017 training report for all Psych units		Development	ANDREA K CHON	2018/05/17
	Training Provides details related to results for a learning unit or units including ...		Development		2018/05/15
	2017 UCSF Report Provides details related to results for a learning unit or units including ...		Development	JEANINE R CRAVEN	
	2018 HIS Report 2017 training report for all Psych units		Development	PATRICIA L OWENS-GOMES	
	Development Plan Report Provides insight into the status of development plans		Performance		
	EVS Routine Clean Provides details related to results for a learning unit or units including ...		Development	FREDERICK J RYAN	
	Goal Report Provides insight into the status of individual goals.		Performance		

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4. a. Click the "Save Filters" icon

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Home Learning Assignments Learning Catalog Reports

Reports > Training

Filters Related Reports

Show:
Training Details

Group by:
No Grouping

Add Filters

Due Date
Before 2018/07/01

Mandatory Activity

2018 Dean's Office Test Report

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4. b. Change the title of the report to "2018 (enter department name) Report" and click "Save"

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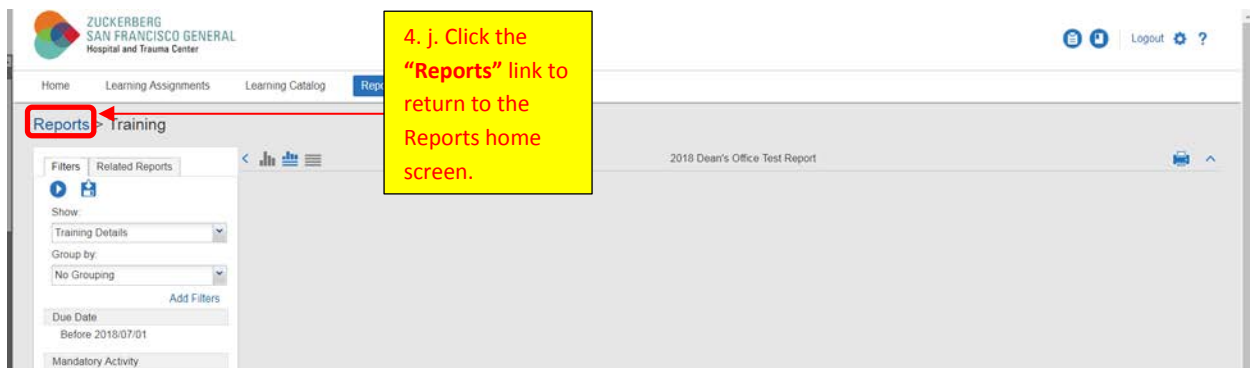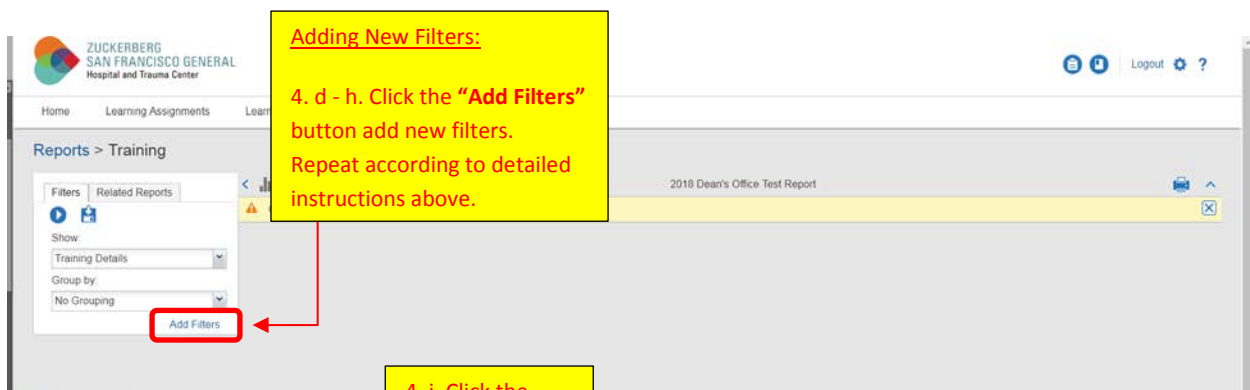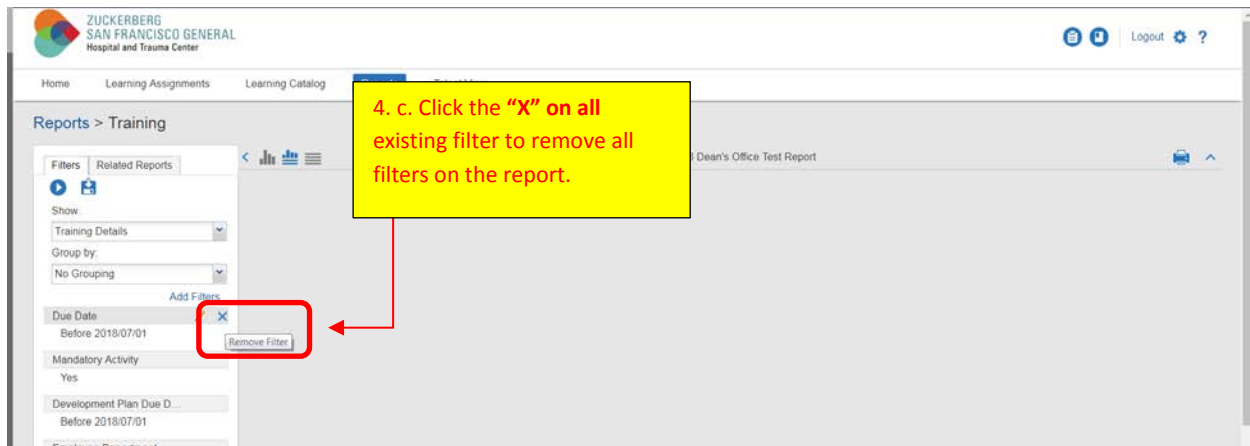Home Learning Assignments Learni

Reports > Training

Filters Related Reports

2018 Dean's Office Test Report

Provides details related to results for a learning unit or units including learning paths and training requests.

Save

2018 Dean's Office Test Report

4. c. Click the **"X" on all** existing filter to remove all filters on the report.

Adding New Filters:

4. d - h. Click the **"Add Filters"** button add new filters. Repeat according to detailed instructions above.

4. i. Click the **"Save Filters"** icon and save the report with the new filters.

4. j. Click the **"Reports"** link to return to the Reports home screen.

5. b. Click the **"Generate Report"** blue icon

5. c. Click the **"CSV Export"** icon

5. d. Click the **"Generate CSV file"** option and click **"OK"** to load the file.

5.e. Click the **"Save CSV Export File"** option to export the CSV file and save it to your computer.