**OREGON DEPARTMENT OF**
Human Services

Reports an Affiliation Manager Can Run
Affiliation Manager Training

Objective: This article provides step-by-step instructions of how an Affiliation Manager can use reports in Workday to support the recordkeeping needs of their organization.

Why this is important to you: If your organization assigns training in Workday, use these reports to track the learning progress of EELearners in your sub-affiliation.

Terms: To understand your abilities as an Affiliation Manager in this task, it's important to understand the terms *upstream* and *downstream* in the context of your role. As an Affiliation Manager, you sit at a particular spot in an agency's organization chart. You have parts of the org chart above you – or *upstream*, and parts of the org chart below you – or *downstream.* In your Affiliation Manager role, you can only see and change things downstream from you. You cannot see anything upstream from where you serve. For example, if you are an Affiliation Manager at position 1 in the illustration shown below, then you can see and edit EELearners in the three partner organizations downstream of you. If you are at position 2, you are already in a most downstream category; you can only edit EELearners in your partner organization.
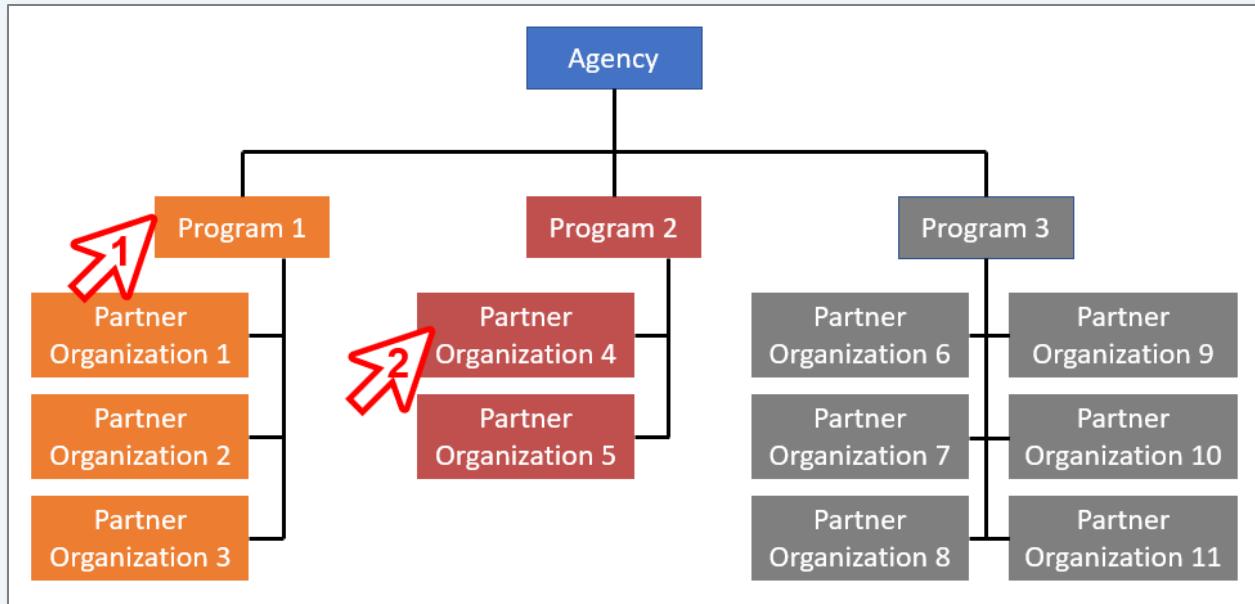
Navigate

From anywhere in Workday,

1. Go to the Affiliation Management dashboard by following one of these two options:
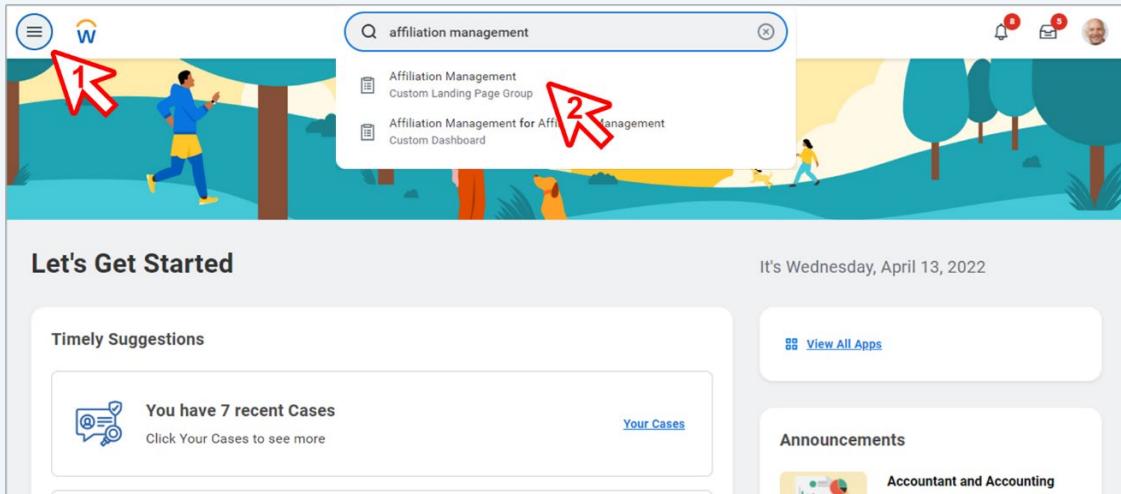
1) Click the 3-bar icon in the upper left corner of Workday, then click the *Affiliation Management* link in the window that opens to the left.

2) Or search for *Affiliation Management* in the top search bar. Do not press the Enter key. Instead click the *Affiliation Management* task that appears below the search bar.

2. At the Affiliation Management dashboard, click the *Learning Reports* tab.
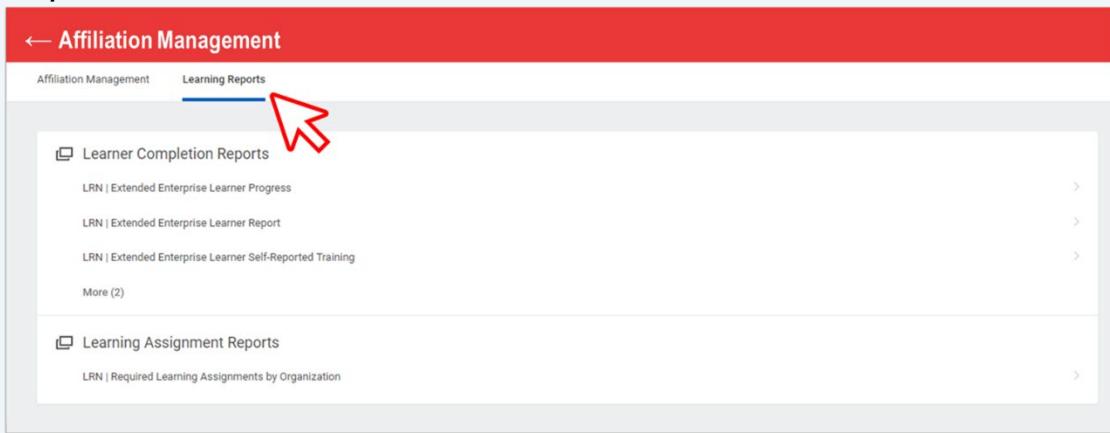
3. From the *Learning Reports* tab, the following reports are available. Click the link below for details on using each report:

1) [Extended Enterprise Learner Audit](#)
   Review the profile details of a EELearner's account, as well as learning summary data. This is useful to assess if there are multiple accounts with the same EELearner name.
2) [Extended Enterprise Learner Progress](#)
   Report the progress of an EELearner, a sub-affiliation, or EELearner Type in self-enrolled or assigned courses. This is the report for a sub-affiliation to see their group's progress.
3) [Extended Enterprise Learner Report](#)
   Report of an EELearner, members of a sub-affiliation, or all members in an EELearner Type.
4) [Extended Enterprise Learner Self-Reported Training](#)
   Report the self-reported training of an EELearner.
5) [Learning Certificates for Export](#)
   Generate a certificate for an EELearner for a specific course in Workday.
6) [EEL Official Transcript for Export](#)
   Generate a copy of an EELearner's official Workday transcript.

NOTE: When entering requirements to generate a report, it is neither necessary nor usually recommended to fill in each field (called a "prompt" in Workday). The more fields completed, the shorter the report will be – because of the many specifics each response needs to include. The fewer prompts completed, the longer the report will be – because each response will need to meet fewer specifications.

1) Extended Enterprise Learner Audit (link goes to report in Workday)

a. Extended Enterprise Learner: Name of the EELearner.
b. Extended Enterprise Affiliation: The name of your sub-affiliation.
c. Extended Enterprise Learner Type: If your sub-affiliation uses this feature, enter the name of your organization's EELearner Type to report on all members in your organization. Most do not use this feature.

    d. Account Creation Date (from): Enter a date to set the earliest account creation date to report on. Leave blank to report on the earliest completion record on file.

    e. Account Creation Date (to): Enter a date to set the last account creation date to report on. Leave blank to report on accounts created up to today.

    f. Last Login Prior to Date: Enter a date to set the last date account was logged into. Leave blank to report on account logins up to today.

    g. Exclude Inactive Personas: Check this box to remove inactivated accounts from the report.

    h. Only Return Learners with ZERO enrollments: Check this box to only report on accounts with no enrollments in any trainings.

2) [Extended Enterprise Learner Progress](#) (link goes to report in Workday)

LRN | Extended Enterprise Learner Progress

Instructions Input your desired criteria below. If no value's are entered, all results will be returned.

a Extended Enterprise Learner:

b Extended Enterprise Affiliation:

c Extended Enterprise Learner Type:

d Learning Content:

e Content Type:

f Completion Status:

g Required Learning: ☐

h Starting Completion Date: MM/DD/YYYY 📅 --:--:-- AM

i Ending Completion Date: MM/DD/YYYY 📅 --:--:-- AM

j Filter Name

Manage Filters   Save

k OK   Cancel

a. Extended Enterprise Learner: Name of the EELearner.
b. Extended Enterprise Affiliation: The name of your sub-affiliation.
c. Extended Enterprise Learner Type: If your sub-affiliation uses this feature, enter the name of your organization's EELearner Type to report on all members in your organization. Most do not use this feature.
d. Learning Content: Enter the name of the course to show results just for a specific course. If left empty, all courses enrolled, in progress or completed will be shown.
e. Content Type: Select from the dropdown of specifically formatted content.

f. Completion Status: Select from dropdown of particular completion status.
g. Required Learning: Check box to limit results to only courses that were assigned as required. If not sure if courses were assigned as required, do not check the box.
h. Start Completion Date: Enter a date that would be the earliest completion date recorded. Leave blank to report on the earliest completion record on file.
i. Ending Completion Date: Enter a date that would be the last completion date of interest. Leave blank to report on completion records up to today.
j. Filter Name/Manage Filters: Once criteria have been entered above, the specifications can be saved as a filter. Enter a filter name then hit the Save button. The next time this report is run, select the saved filter to populate the specifications.
k. OK: Once the desired report criteria have been entered, click the OK button to generate the report.

3) [Extended Enterprise Learner Report](link) (link goes to report in Workday)
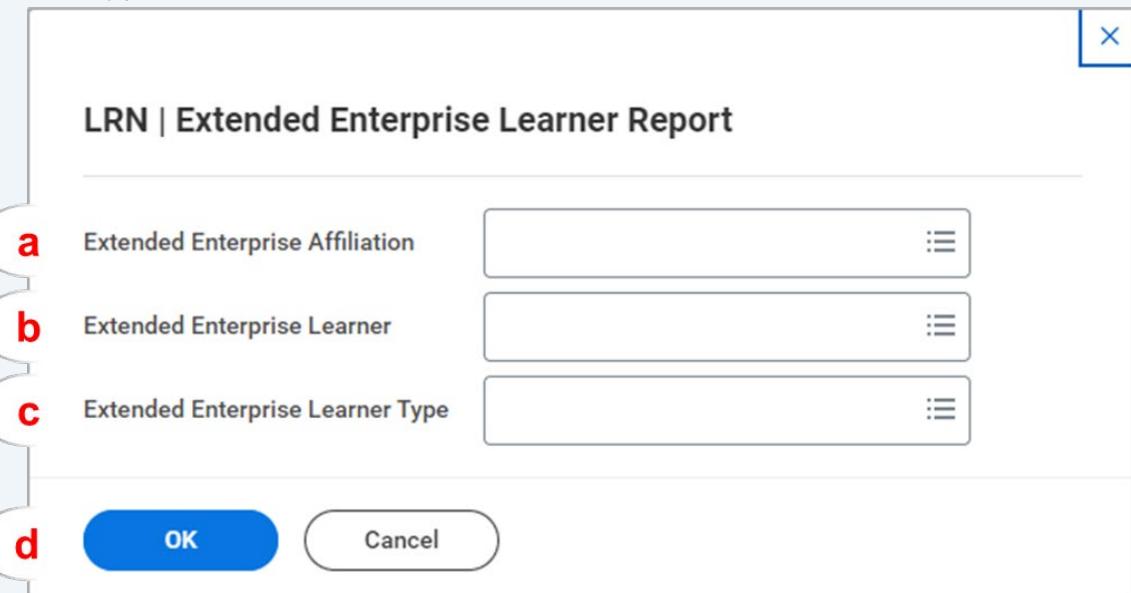
a. Extended Enterprise Affiliation: The name of your sub-affiliation.

b. Extended Enterprise Learner: Name of the EELearner.
c. Extended Enterprise Learner Type: If your sub-affiliation uses this feature, enter the name of your organization's EELearner Type to report on all members in your organization. Most do not use this feature.
d. OK: Once the desired report criteria have been entered, click the OK button to generate the report.

4) [Extended Enterprise Learner Self-Reported Training](#) (link goes to report in Workday)

a. Extended Enterprise Affiliation: The name of your sub-affiliation.
b. Extended Enterprise Learner: Name of the EELearner.
c. Filter Name: If you've created filters, select from saved options.
d. OK: Once the desired report criteria have been entered, click the OK button to generate the report.

5) [Learning Certificates for Export](#) (link goes to report in Workday)
NOTE: This report is not specifically created for the Extended Enterprise Learning environment, so different terms are used here to broaden its use with EELearners and state workers.

a. Learner: Name of EELearner
b. Learning Content: Name of course. Leave blank to generate a certificate for each course the EELearner has completed.
c. Completion Date (from): Enter a date to set the earliest completion date to report on. Leave blank to report on the earliest completion record on file.
d. Completion Date (to): Enter a date to set the last completion date to report on. Leave blank to report on completion records up to today.
e. OK: Once the desired report criteria have been entered, click the OK button to generate a report of the available certificates. Then click the PDF icon near the upper right of the window to generate a PDF of each certificate.

6) [EEL Official Transcript for Export](#) (link goes to report in Workday)
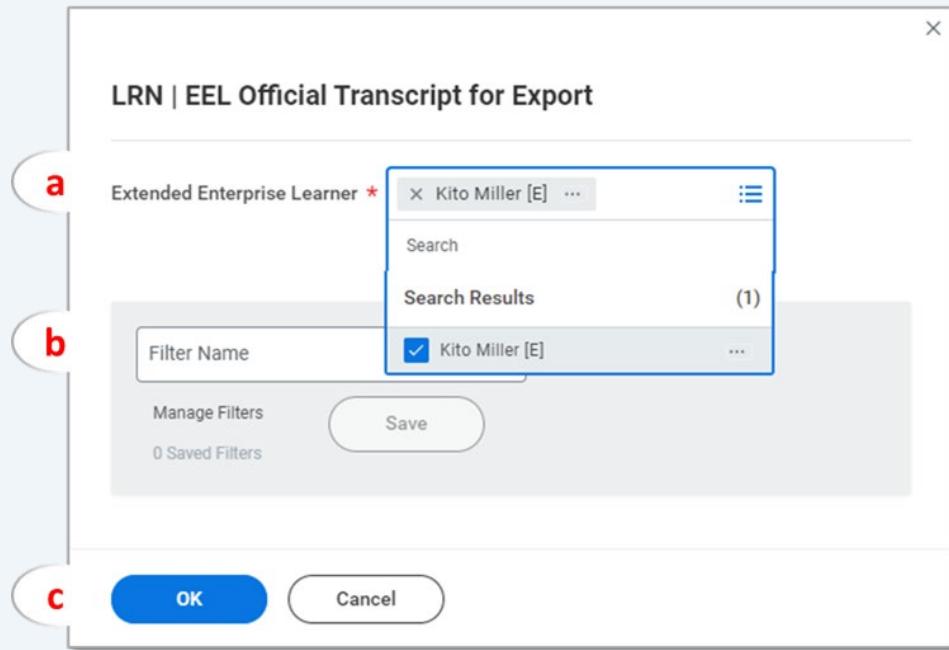
a. Extended Enterprise Learner: Enter name of EELearner.
b. Filter Name: If you've created filters, select from saved options.
c. OK: Once the desired account is checked, click the OK button to see learning records for the EELearner. Then click the PDF icon near the upper right of the window to generate a PDF of the EELearner's transcript.