StatZen Reporting

Last Modified on 12/22/2021 2:13 pm CST

Dashboard Overview

The dashboard is the first page that appears upon entering the StatZen console. This dashboard offers a quick summary of license usage, exam performance, course completion, and phishing campaign performance for your organization. Additional details are provided for each quadrant of the dashboard below.

0

Quadrant 1: License Utilization

This section displays the number of active users your organization currently has registered vs. the maximum number of licenses available to your organization.

0

Note: If your organization is nearing the license cap, or if the organization needs to train additional users previously unaccounted for, please reach out to your account representative for assistance so that we can add additional licenses to your account.

Quadrant 2: Average Exam Results

This horizontal bar graph displays the average course scores for your organization. This will be broken out by the groups which have been created in iLMS.

0

Quadrant 3: Course Completion

This vertical bar graph displays a breakout of course completion status by group. The bars show the number of courses that are completed, in progress, and not started for each group.

0

The top bar on this graph also provides a link to a detailed report which will provide the transcript data for the

learners in your organization.

0

Quadrant 4: Phishing Simulation Performance

This stacked area chart displays performance data for all of your organization's phishing campaigns. Campaigns are listed on the bottom axis in the order by creation date so that you can see how this performance changes over time. It shows the number of simulations sent to learners vs. the number of users that performed the unsafe action in the simulation (clicking the link, submitting the form, opening the attachment).

0

The top bar on this graph also provides a link to a detailed report which will provide the Phishproof campaign data for the learners in your organization.

0

Learn more about customizing your reports with the following articles:

- Creating Custom Reports in StatZen
- Filtering Reports in StatZen
- Categories and Drill Downs on StatZen Graphs
- Add/Removing Fields on Tables in StatZen

If you would like a one-time export or schedule regular exports of the dashboard or any other report see these articles:

- Exporting StatZen Reports
- Scheduling StatZen Reports

Org Reports

StatZen offers a handful of default reports that your organization can view for quick insight into learner training performance and completion. Below we've listed out all of the default reports available with StatZen and provided details about the data covered in each report.

The SFA Dashboard will open by default each time you access StatZen. To access other org reports navigate to the upper-left corner to open the menu and then open the "Org Reports" section to see the list of available reports.

0

Learn more about customizing your reports with the following articles:

- Creating Custom Reports in StatZen
- Filtering Reports in StatZen
- Categories and Drill Downs on StatZen Graphs

Add/Removing Fields on Tables in StatZen

If you would like a one-time export or schedule regular exports of the dashboard or any other report see these articles:

- Exporting StatZen Reports
- Scheduling StatZen Reports

Course Utilization Report

This report is comprised of two graphs. It provides a quick overview of overall enrollment for all courses and the breakdown of user statuses in each course that has users enrolled.

Course Utilization Graph

This graph will list the first 25 courses in your organization's account along with a breakdown of the percentage of your organization's registered users that have been assigned the particular course. You can hover over sections of the bar graph to view more details for each segment.

If your organization has more than 25 courses we recommend filtering the graph down to select courses for a better view, or to see courses that may not be listed by default due to the cap.

0

Enrollment Status Graph

This graph will list the first 25 courses in your organization's account that contain enrolled users. It then displays the percentage of users in each course status for the given course; completed, in progress, not started.

If your organization has more than 25 courses assigned to users we recommend filtering the graph down to select courses for a better view or to see courses that may not be listed by default due to the cap.

0

Phishproof Susceptible Users

This table-view report provides a detailed list of all users that have received a Phishproof simulation along with the details of their performance for each campaign they have received. It also offers some quick filters displayed on the right-hand side of the report to easily view details for select campaigns or time periods. This report shows a set number of results per page and allows you to click through pages at the bottom of the report screen.

0

SFA Course Transcript

This table-view report provides a detailed list of all transcript data for your organization's users. It displays all the data in the user's profile, and if you scroll to the right it displays the transcript details for each course assigned. This report shows 25 results per page and allows you to click through pages at the bottom of the report screen.

SFA Dashboard

This dashboard serves as the initial landing page whenever you first enter the StatZen console. The link to this dashboard is available under org reports as well in order to allow you to navigate back to the initial dashboard after viewing other reports.

This dashboard is covered in full detail here:

StatZen Dashboard Overview

Exporting Reports

To export a report click the icon on the top bar on the given report page.

0

This will pop up an export dialog options which will allow you to select the format in which you'd like to export the dashboard snapshot.

0

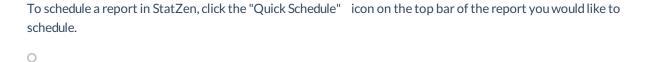
- For the dashboard or other reports graphical reports, we recommend PDF as the ideal export format.
 - For best results when exporting to PDF, expand the "more options" section and uncheck the "Compress Image" option. This will ensure that smaller numbers are as crisp and legible as possible. (pictured below)
- For table style reports, we recommend exporting to Excel using either the "Excel" option or the "CSV" option from the format dropdown.
 - The Excel option will keep color formatting while the CSV option will provide strictly the data.

Click "OK" to export the file in the chosen format.

Note: If you do not see the "OK" or "Cancel" buttons at the bottom of the pop-up, they may be obscured by the bottom of the report frame. You can bring them into view by clicking the top bar of the pop-up and dragging it upwards until the buttons are visible so that you may finish the export.

StatZen allows your organization to schedule reports to be sent out on a regular basis to specified recipients. With this feature, your team can stay up to date on training progress even when you're not logged into the reporting console.

Creating a Scheduled Report



Clicking this icon will bring up the Quick Schedule pop-up.

0

To schedule a report simply fill in the applicable information according to your organization's needs.

Schedule Name

This field can be left blank. Information entered here will not be visible in the console. The system will use the name of the report for which you are setting a schedule.

Time Type

This dropdown offers two options, immediately or periodically. Immediately will send a one-time report to the email(s) you specify; whereas, periodically will allow you to set up a recurring report send.

Date/Time

This field appears only if "Periodically" is selected in the Time Type dropdown.

This is the frequency at which the report will send. Reports can be scheduled on a daily, weekly, or monthly basis.

0

Daily lets you select only the time of day the report will send.

0

Note: The time zone for scheduled reports is CST (GMT-6)

Weekly will allow you to select the day of the week on which the report will send.

0

Monthly will allow you to pick the recurring day of the month.

0

Publish To

This is the delivery method of the report. Email is selected by default.

There is also the option to publish to a secure FTP location if your organization has an existing secure FTP location, this will require the information and credentials for the site.

To/CC/BCC

These are the recipients of the report. Multiple email addresses can be listed separated by a comma.

Example: Email1@mycompany.com, Email2@mycompany.com

Subject

The subject of the email.

Comments

The body of the email.

E-mail Result In

Checking this option outputs the report in the body of your email. This should only be used for very small reports.

Notes: We <u>do not</u> recommend checking this box for any report that is not a simple dashboard. Reports with large tables containing a lot of data do not do well in the body of an email and perform much better as an attachment. Checking this option for a larger report can impede the report from sending or opening in the receiving inbox due to size limits.

Attachment In

This option will include the report as an attachment to the email in the format you select from the dropdown.

Once all fields have been populated with the desired settings click "OK" to save your scheduled report.

View and Edit Existing Scheduled Reports

Once a scheduled report has been created it will be visible in the scheduled report list for your organization. To access the list of scheduled reports, click the clock icon in the upper-right corner of the reporting console.

0

Here you'll see a full list of all reports currently scheduled for your organization. Each report displays the report name, timezone, Frequency, Day/Month, and Time set for the report.

0

On the right-hand side there are a few options for each report.

0

Edit

This will allow you to modify the current settings for the scheduled report

0

Run Now

This option allows you to run a report immediately outside of its normal scheduled cadence. This will not impact the next scheduled send.

Completed History

This option will display a list showing all historical sends for the report including the date/time the report was sent and the result of the attempted send.

0

Delete

As one might expect, this option allows you to delete scheduled reports if they no longer needed.

Creating Custom Reports

While StatZen does offer multiple reports out of the box, organizations have different reporting needs. To meet these needs StatZen offers the ability to customize and save reports.

To get started, pick an existing report as a starting point. From there you can use filters, drilldowns, and add/remove fields in order to tailor the report to display the data your organization needs. Each feature has it's own article that covers the tool in detail.

Once you've achieved the desired results, click the save as button on the top bar of the reporting pane to save as a new report.

0

Note: StatZen's default org reports can not be altered. Any customized versions are saved as a new report.

You then only need to specify a name for your report to save it as a custom report. Once named, click ok to save your custom report.

0

Once you've saved your new report it will be displayed under the "My Reports" section. This section only appears once your organization has saved its first custom report. If the custom report has just been created then you may need to refresh the StatZen page via your browser in order for the new report to show up in the list.

0

Filtering Reports

StatZen allows you to filter reports down to just the data your organization needs to see. All of the filtering options are available on the top bar above the report.

0

Graphs and tables will operate a little differently with the filtering tools due to the fact that our graphical reports usually have multiple graphs on the page that display different data sets, so different filters can be applied to individual graphs; whereas, reports displayed in table format are typically the only report displayed on the page so there's only one report to filter.

Standard Filter and Query Filter

Filter

This is the most basic filtering option. Only allows filtering based on a limited selection of relevant fields. When used on a graph-based report it will automatically display filtering options for the last graph selected.

The example here shows the options for the **Average Exam Results** graph on the **SFA Dashboard** report. In this example it only allows you to filter by group as it is the category currently in use with the graph.

0

Query Filter

This option allows filtering based on any available field for the selected graph or table. (The default on multi-graph reports will be the last graph clicked)

The example here shows the options for the **Average Exam Results** graph on the **SFA Dashboard** report. In this example, it allows filtering by any field in the data set that feeds the Average Exam results graph.

0

Both the standard Filter and Query filter provide a list of operators such as equal to, greater than, less than, and more.

0

You can also add additional criteria with the right-most dropdown by selecting "And" or "Or" from the dropdown.

0

Once your desired filters have been created. Click OK to apply.

Please Note: Filters are case-sensitive

Note: The Query filter is a good option for building reports that may return 0 results at the time of building; such as, a report for incomplete courses. With this filter type you can build a report in advance and schedule it to run

regularly.

0

The advanced filter only lets you filter based on criteria that yields at least one record.

Tooltip for Searching Partial Field Contents:

Use wildcards such as % for multiple characters, and _for a single character.

In the example below, these filters would include any courses with the word "Policy" in the title on the report whether it was uppercase or lowercase.

0

Advanced Filter

This option will allow you to set up filters for any field in a table or apply filters to multiple graphs. It displays all Data Groups in use on the report and the fields within each of those data groups.

To open the advanced filter click the double arrows on the top bar and this will pop out a filter selection tray to the left of the graph. To start adding filter criteria click the + plus sign to see available fields.

0

This will pop up the field selection box. Place a check next to the fields you'd like to add to the filter and click OK.

0

The checked fields will be added to the filter pane which will now display all the options for that field. Click the desired listed options in order to select which items you'd like to appear in the report. You can ctrl/cmd-click to select multiple inputs.

0

The filter parameter pane also allows you to search for values in a field, erase current filters, or remove the field from filter criteria with options at the top of the pane.

0

Note: SFA Dashboard

Each Data Group will only correspond to applicable graphs on the dashboard. Below is a breakdown of which Data Groups apply to which graphs.

BV Enrollments

This section includes filtering options for the following graph(s):

- Average Exam Results
- Course Completion

BV Learner Details

This section includes filtering options for the following graph(s):

• License Utilization

BV Phishproof SFA

This section includes filtering options for the following graph(s):

• Phishproof Simulation Performance

Modifying Graphs

Changing Category Display

All StatZen graphs have a default display category. For example, on the SFA Dashboard, the Average exam results are categorized by group. In certain situations your organization may want to see this broken down in a different manner in order to achieve this follow the steps below:

- The categories displayed can be changed by <u>right-clicking in the negative space</u> of a particular graph to bring up a menu
- From the resulting menu, mousing over "Switch Category" will expand a list of other criteria to use in order to break the data into categories.
- In the example below, we chose "Course Name". This will then list Exam results broken out by the individual course.

Note: StatZen graphs are only capable of displaying a limited number of items, so if selecting a category with a long list of results such as Course name, it is advised to use this feature in conjunction with filters to see data for a smaller sample of items. In our example below, we've also applied filters to only display 3 select courses on the graph.

0

0

Drilling Down

In certain situations in order to learn more about the data displayed on a graph you need to dig a little deeper and drill down into the data that makes up the graph. To drill down further into a category displayed on a StatZen graph, follow the steps below:

- StatZen allows you to drill down on graph data by right-clicking a specific value label.
- From the resulting menu, mousing over "Go to by Value" will expand a list of other criteria to drill down into for

your selected value label.

• In the example below, we chose to drill down into the average exam results of our *IT Staff* group to see the exam results by Course for just that group.

0

The graph in our example now displays the exam results for just the IT Staff group broken out by course.

0

Add/Removing Fields on Tables

StatZen tables can be modified to display only the columns of information that is required. Unlike other features in StatZen such as filtering, the column editor only appears on custom reports. If viewing a default org report in StatZen you will first need to click the "Save As" icon on the top bar and save it as a new report.

Detailed instructions on saving a custom report here: Creating Custom Reports in StatZen

After accessing the custom report, The view mode dropdown should appear at the far right end of the top bar.

Select "Edit Mode" under View Mode to bring up advanced editing options.

C

Adding Fields

For most table reports in StatZen there are additional fields available for use that are not included by default.

Upon switching to edit mode for the table a resources panel pops out to the left side of the report. This panel lists all possible fields that can be used for the given report.

To add a field that is not currently used in the report, click and drag the field from the panel into the report. The newly added field will be inserted as a new column wherever it is dropped.

0

Once the report reflects only the data that is wanted, click Save As and click OK to save the changes to the custom report.

Note: If the "OK" or "Cancel" buttons are not visible at the bottom of the pop-up, they may be obscured by the bottom of the report frame. Bring them into view by clicking the top bar of the pop-up and dragging it upwards until the buttons are visible so that you may finish the export.

Removing Fields

Depending on your goals there are a couple of methods to remove fields from your report.

Few Fields

If you are removing just a few fields, fields can easily be removed by <u>right-clicking</u> in the column area and then selecting "Delete" from the resulting menu.

C

Many Fields

To remove several fields from a report then it may be quicker to remove fields by using StatZen's table wizard. This tool can be opened by clicking either of the first two icons on the toolbar to the left of the table.

0

Once the table wizard is open it will present two panes listing fields. The left side lists available fields that are not currently in the report. The right side lists all fields that are currently used in the report.

- 1. To remove a field click the name of the field you'd like to remove in the field list on the right.
- 2. Then click the arrow between the panes in order to remove that field from the list.
- 3. Repeat this process until all unwanted fields have been moved.
- 4. Once the report reflects only the data that is wanted, click Save As and click OK to save the changes to the custom report.

0

Note: If the "OK" or "Cancel" buttons are not visible at the bottom of the pop-up, they may be obscured by the bottom of the report frame. Bring them into view by clicking the top bar of the pop-up and dragging it upwards until the buttons are visible so that you may finish the export.

Custom Column Labels in Tables

StatZen offers the ability to apply custom labels to the columns in a table. This especially useful when working with the custom user profile fields available in iLMS. Unlike other features in StatZen such as filtering, the table editor only appears on custom reports. If viewing a default org report in StatZen first click the "Save As" icon on the top bar and save it as a new report.

Detailed instructions on saving a custom report here: Creating Custom Reports in StatZen

After accessing the custom report, The view mode dropdown should appear at the far right end of the top bar.
Select "Edit Mode" under View Mode to bring up advanced editing options.
To apply a custom label to a field follow the instructions below:
0
 Locate the field that requires a custom label. Right-click the column heading to bring up a menu. From the menu select "Properties".
 In the label properties box uncheck the "Auto Map Field Name" checkbox. Type the Custom Field name in the "Text" field. Click Ok to apply.
Note: The Label properties box also allows you to change the color (background) and width of the column.
The custom label will now appear in the report.
• Click the save button on the top toolbar to save the changes to the custom report.
0