

Generating Monthly Training Reports

Last Modified on 06/11/2026 1:26 pm EDT

Custom Reports are used to create the Monthly Training Report that is sent to the Account Managers. The report is a shared Excel file and is largely automated. Three Custom Reports are used in TLMS to get the needed information: **SPOLT Report** for self-paced courses, **ILT Report** for instructor-led courses, and **365-day PMA Signups** for a raw count of users that have logged in for the first time.

- The reports will show the user, email address, course, enrollment date, status, group, and company name. The SPOLT report will also show the time spent, in seconds.
- These reports will be automatically emailed as an Excel attachment to
From there, automation is used to save the file in a specific folder for Power Query to access.

Note there is currently not a time parameter for this report, such as the last 90 days; the report will show ALL completion data in the system. Date filtering takes place in Power Query/Excel. However, as the file gets larger this may need to be changed.

Reports > Custom reports

ILT Report

[Edit report](#)

Search [Mass actions](#) [Export in Excel](#)

User	Email	Course	Enrolled on	Status	Groups	Company Name
Alicia Birts	abirts@ups.com	PM 101: PoliteMail Basics	04/23/2026	Not started yet	Mike	UPS Supply Ch...
Alisa Carbone	alisa.carbone@politemail.com	PM 100: PoliteMail for A...	04/27/2026	0%	Marketing	PoliteMail
Alisa Carbone	alisa.carbone@politemail.com	PM 202: PoliteMail Buil...	03/05/2026	0%	Marketing	PoliteMail
Alisa Carbone	alisa.carbone@politemail.com	PM 201: PoliteMail Buil...	03/05/2026	0%	Marketing	PoliteMail
Ashleigh Nary	ashleigh.nary@victra.com	PM 203: Using Beefree ...	04/20/2026	Not started yet	Paul	Victra
Ashleigh Nary	ashleigh.nary@victra.com	PM 202: PoliteMail Buil...	04/20/2026	Not started yet	Paul	Victra
Ashley Funes	FunesA@autonation.com	PM 101: PoliteMail Basics	04/15/2026	0%	Paul	AutoNation
Brett Goldstein	brett.goldstein@wolterskluwer.com	PM 203: Using Beefree ...	04/08/2026	Not passed	Melissa	Wolters Kluwer
Brett Goldstein	brett.goldstein@wolterskluwer.com	PM 101: PoliteMail Basics	03/27/2026	0%	Melissa	Wolters Kluwer
Brett Goldstein	brett.goldstein@wolterskluwer.com	PM 202: PoliteMail Buil...	03/27/2026	0%	Melissa	Wolters Kluwer
Brett Goldstein	brett.goldstein@wolterskluwer.com	PM 201: PoliteMail Buil...	Yesterday	Not passed	Melissa	Wolters Kluwer

Custom/Special Training Sessions

Custom Training List

Search for tools, help, and more (Alt + Q)

File Home Insert Share Page Layout Formulas Data Review View Automate Help Draw

Undo Paste Copy Format Painter Clipboard Font Alignment Number Styles Cells

1	Special Training		
2	Course	Date	Company
3	PM100 Admins	11/19/2025	Emergent/BCBS
4	PM203 Beefree	12/9/2025	UnityPoint
5	PM203 Beefree	12/5/2025	University of Chicago
6	PM101 Basics	12/22/2025	Metrolinx
7	Best Practices Overview	12/10/2025	Takeda
8	PM101 Basics	11/26/2025	Takeda
9	Template Training	11/25/2025	A New Health
10	PM301 Metrics	11/24/2025	Hoffmaster
11	PM100 Admins	11/19/2025	Emergent BCBS
12	Template Training	11/19/2025	STP Nuclear
13	Template Training	11/14/2025	Holmes Murphy
14	Template Training	12/13/2025	Hoffmaster
15	Template Training	11/10/2025	Takeda
16	Template Training	11/6/2025	Takeda
17	Template Training	1/8/2026	WK Kellogg
18	PM301 Metrics	1/20/2026	WK Kellogg
19	PM101 Basics	2/12/2026	SWCA
20	PM Onboarding	2/11/2026	Cheniere
21	Custom Fields	2/27/2026	Nuvance Health
22	Pageworthy Template	2/27/2026	HAP
23	Template Training	2/9/2026	Biogen
24	PM100 Admins	2/4/2026	Biogen
25	PM101 Basics	2/19/2026	Wolters Kluwer
26	Upgrade Training	3/10/2026	CapGroup
27	PM101 Basics	3/11/2026	AmEx
28	PM100 Admins	3/24/2026	BakerHughes
29	Template Training	3/26/2026	BakerHughes
30	PM101 Basics	3/24/2026	BakerHughes
31	Best Practices Overview	3/18/2026	MD Anderson
32	Desktop App Overview	3/10/2026	Cheniere
33	PM100 Admins	4/27/2026	Latham and Watkins
34	PM101 Basics	4/24/2026	BakerHughes
35	Custom Fields	4/17/2026	Biogen
36	Template Training	4/3/2026	Wolters Kluwer
37	Template Training	4/2/2026	Biogen
38	Segmentation	4/10/2026	Wolters Kluwer

Although TLMS can be used to enter special events in the Calendar and mark them as private or visible only to a Group, there is no reporting capability around these. Consequently, an **Excel** has been created and shared to enter custom training sessions.

This **Custom Training List** should be updated by each trainer by the 28th of each month. This file is also pulled by the Power Query to automatically integrate into the Monthly Report.