

DIOCESE OF WINONA-ROCHESTER

VIRTUS® - HOW TO RUN NEW MASTER REPORT

(Also, to be used for a Training Bulletin Report)

Administration Tab Click on Master Report (2022)

**Home** **Library** **Facilitators** **My Diocese** **Services** **Formacion** **Educators** **Administration**

## Administration

**System Administration**

- New User Signups
- Preregistered Users
- Users
- User Search
- Alias Search
- Roles
- Profiles
- Locations
- Groups
- Communication Center
- Message Board
- System Setup

**Training Administration**

- Training Bulletins
- Online Training Modules
- Live Training

**Reports**

- Compliance Reports
- User Reports
- Training Reports
- Background Checks

### VIRTUS Online Administration

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**Main Reports**

- Master Report
- Compliance Report
- Compliance Audit—Chart C/D Combo
- Renewal Report

**Quick Actions**

- Approve users
- Schedule a session

**Other Reports**

- Activity Report by Location
- Activity Report by User
- Background Check Report
- Calendar of Scheduled Training
- Compliance Audit—Required Documents
- Live Training Report
- Training Bulletin Report

After all selections are made on the report below, you have two options to review the report:

1. Run Report to Screen
2. Export Report to CSV. This option is optimal as you can download and manipulate the results. If you want to save this report, make sure to save in the Excel format.

If you run the report as listed below and you have kept, the VIRTUS® website updated for your location(s) the information you receive is what is needed to complete the Safe Environment Audit report to the Office of Safe Environment the end of May each year.

**Locations:** Select the location you want the report. If there are more than one; select one then press the 'Ctrl' key and the additional locations desired.

**Roles:** Leave this as 'All Roles'

**Profiles:** Leave as 'All Profiles'

**Continuing Training:** Leave as 'All Training Statuses'

**Master Report**

**Filters**

**Location:** -- All Locations --  
All Saints Church-Madison Lake (Madison Lake)  
All Saints Church-New Richland (New Richland)  
All Saints School-Madison Lake (Madison Lake)  
Assumption Church-Canton (Canton)  
Blessed José Sanchez Del Rio High School Seminary-Mankato (Mankato)  
Cathedral of the Sacred Heart-Winona (Winona)

**Role:** -- All Roles --  
\* Candidate for ordination  
\* Deacon  
\* Educator  
\* Employee  
Facilitator  
Local VIRTUS Coordinator

**Profile:** -- All Profiles --  
Administrator  
Basic User  
Deacon  
Default  
Facilitator  
Faith Formation Director

**Continuing Training:** -- All Training Statuses --  
Not Required  
Required: Bulletins  
Required: Printed  
Childrens Program Only  
Completed: Access  
Completed: No Access

The choices with the BLUE checkmarks are recommendations. **Once selected they remain set (static) unless you change them.**

### User Fields

- Last
- First
- Middle
- Nickname
- Salutation
- Login ID
- Email
- Account Status
- Primary Location
- Primary Location ID
- All Locations (select to find users in secondary sites)
- Roles in primary location only (select to limit roles to only those in the user's primary location)
- Roles Linked to Location
- All Roles
- Profile
- Language
- Position/Title
- Facilitator Tab
- Educator Tab
- Continuing Training Status
- Contact with minors
- Contact with vulnerable adults
- Address
- Address 2
- City
- State
- ZIP
- Daytime Phone
- Evening Phone
- Group
- Approval Date
- Registration Date
- Last Login
- Inactive Date
- User Notes
- Database ID\*
- External ID
- External ID 2
- External ID 3
- Caution Flag

\* include this field if you will be sending the report to VIRTUS Support

## Background Checks

Combine all selected background check types into one column - You must select the items below to combine

- LexisNexis: National Criminal Background Check (inactive)
- s2Verify: Employee/Volunteer
- s2Verify: Re-screening Package
- s2Verify: Volunteer/Employee

[I want to show another background check grouping](#)

## Required Documents

Combine all selected document types into one column - You must select the items below to combine

- Attestation of Cleric Ministering in DOWR
- Code of Conduct
- Code of Conduct (inactive)
- Code of Conduct (inactive)
- Code of Conduct (old) (inactive)
- Declaration (inactive)

[I want to show initial training separate from continuing training](#)

### Training

Combine all selected training types into one column - You must select the items below to combine

#### Live

- CLERGY ONLY April 2022 Recertification Training
- CLERGY ONLY October 2021 Recertification Training
- Protecting God's Children for Adults
- Protecting God's Children for Facilitators
- Protecting God's Children for Parents

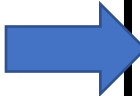
#### Online

- A Plan to Protect God's Children 4.0\_Winona-Rochester
- Bloodborne Pathogens (2020)
- Keeping the Promise Alive 3.0
- Keeping the Promise Alive 3.0 (Spanish)
- Protecting God's Children® Online Awareness Session 3.0 (Spanish)
- Protecting God's Children® Online Awareness Session 4.0 (Español)\_Winona-Rochester
- Protecting God's Children® Online Awareness Session 4.0\_Winona-Rochester
- Protecting God's Children® Online Awareness Session 3.0
- Virtus® Protecting God's Children® Re-certification Training for Facilitators\_Winona

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### Bulletins

- Protecting God's Children for Adults
- Show only users who are currently active
- Show only users who are currently active (including pending users)
- Show only users who are currently pending
- Show users who were active from:  to:  (e.g. audit period)
- Show facilitators only
- Show only users who are inactive
- Show all users (including inactive users)\*



To run a VIRTUS Training Bulletin report to see who is behind on their monthly bulletins click the box "Protecting God's Children for Adults".