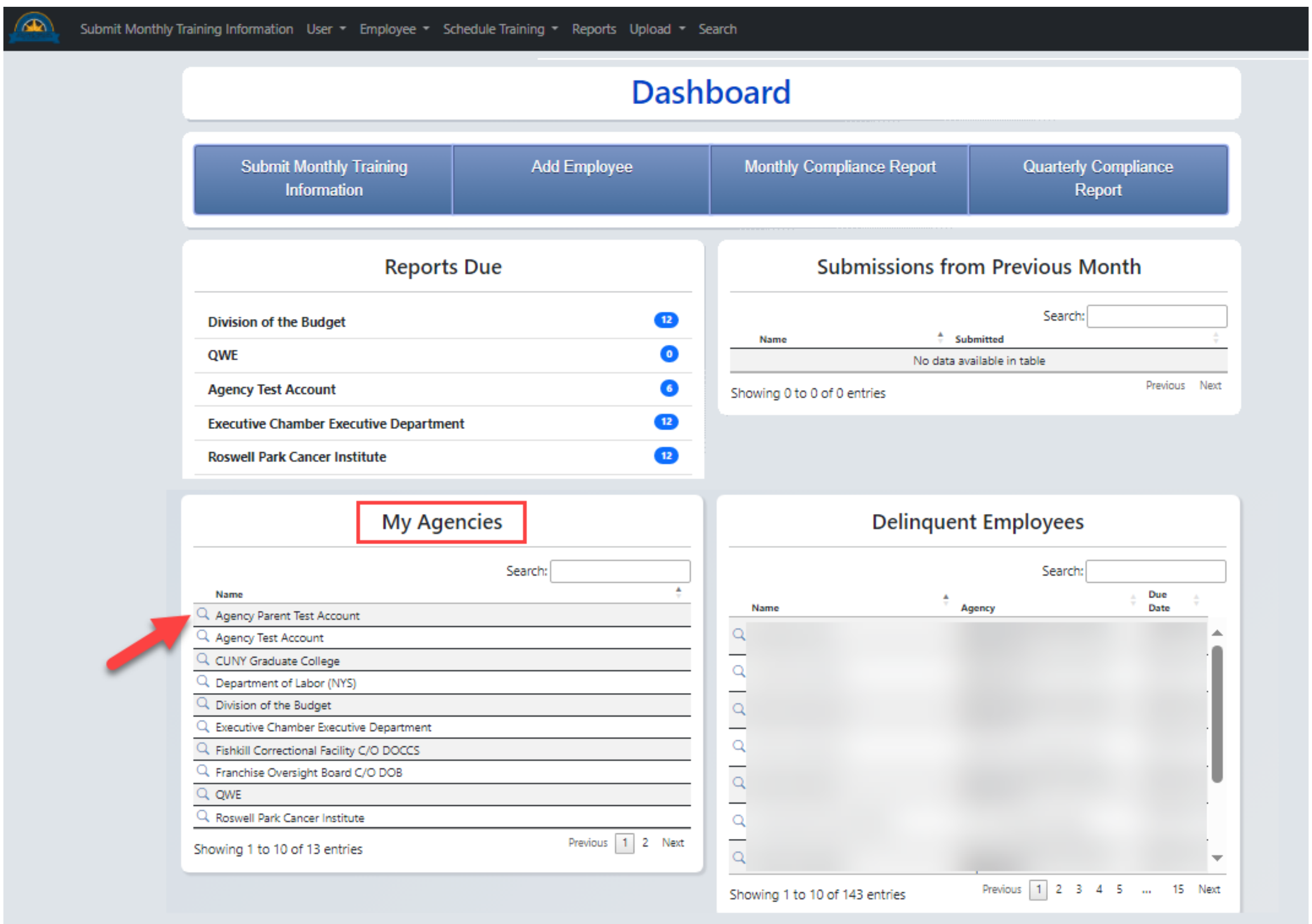
How to use the 'Manage Function' to filter and create custom reports in the Statewide Ethics Training Application ('SETA')

Q: How can I easily filter and sort employee data to create a custom report in Excel – *How do I do it*?

Instructions on how to use the **'Manage'** function within your Agency Profile to filter, sort and export to Excel.

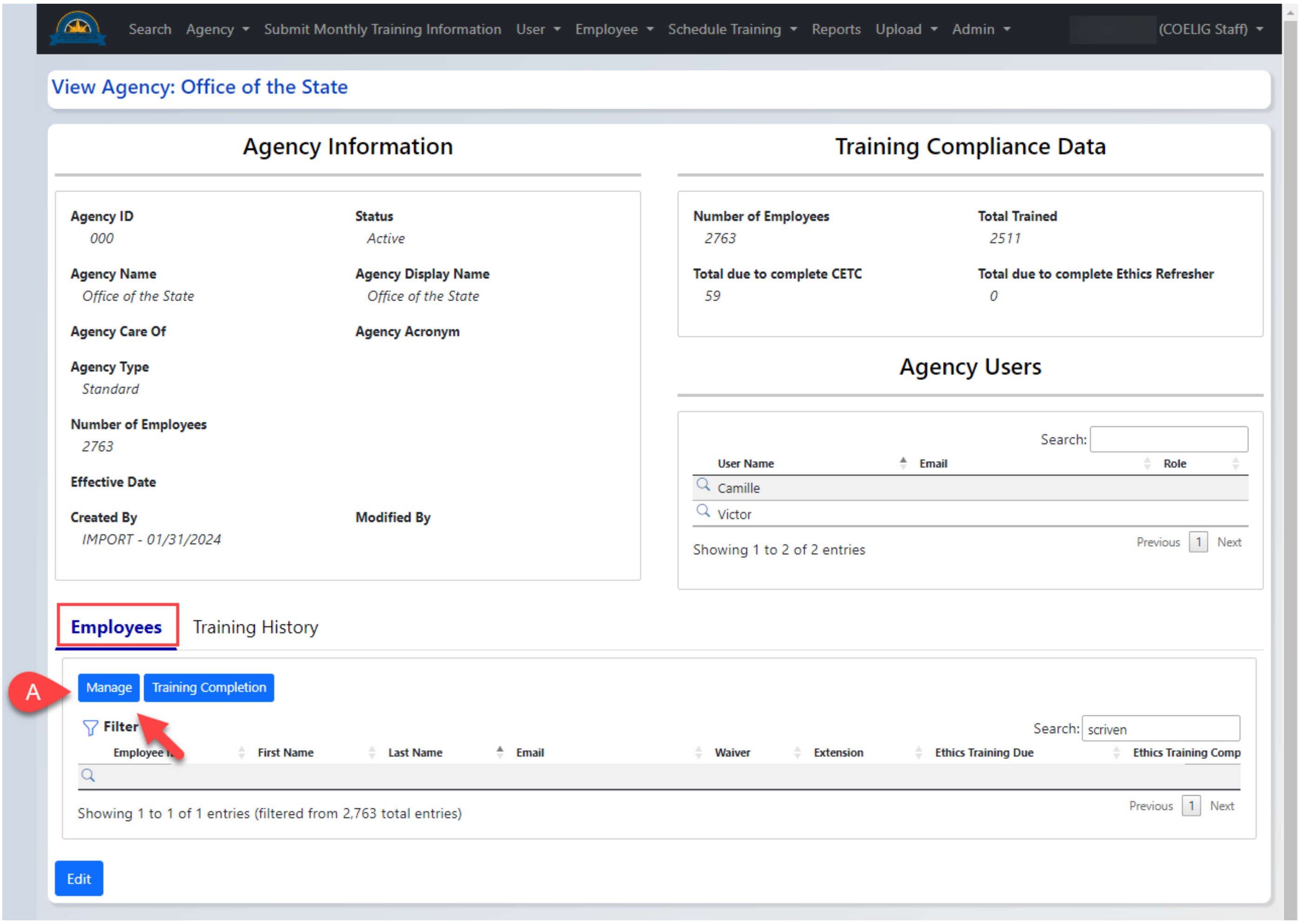
Step-by-step 'how to' instructions

1. ***How to access your agency profile*** – from your dashboard – locate the '**My Agencies**' section and click the 'magnifying glass' icon next to the name of the agency profile you would like to open/view. The magnifying glass icon allows you to open/view different screens within SETA.

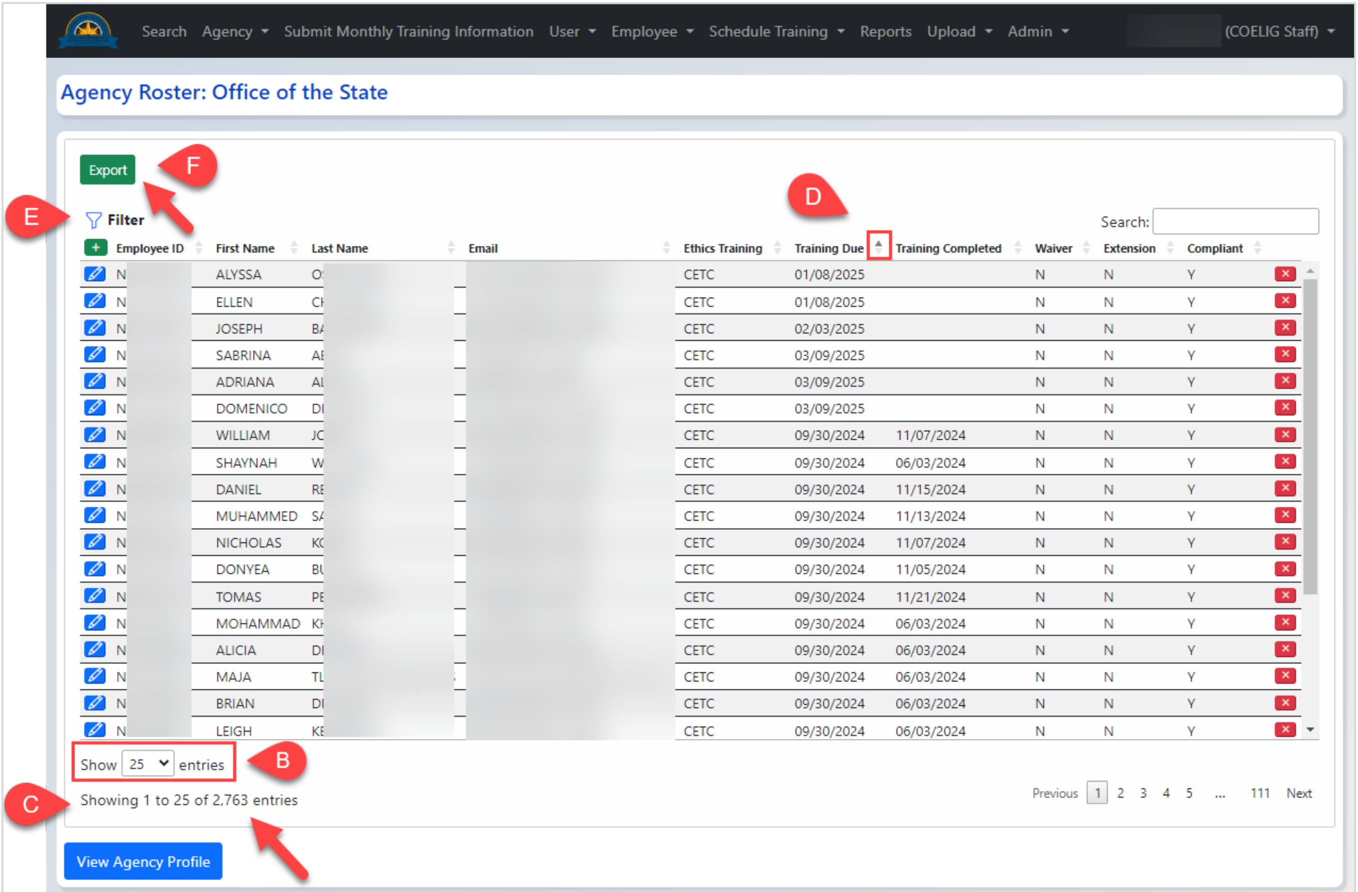


2. **From your Agency Profile:**

   A. Click the **'Manage'** button to access the **Agency Roster** screen.



From the Agency Roster Screen:

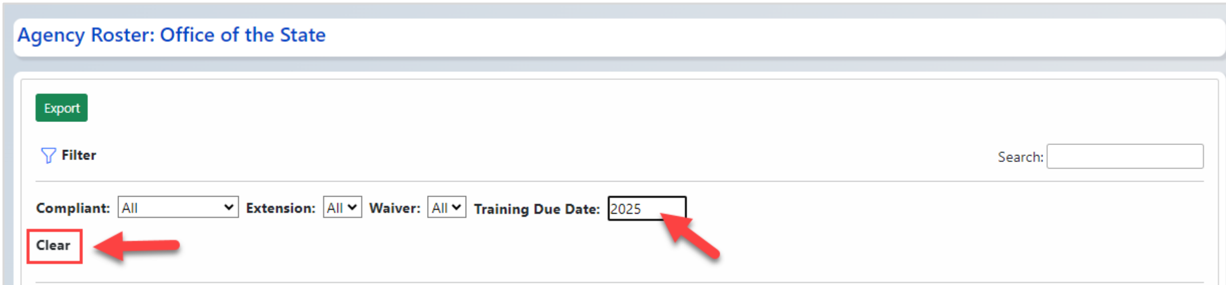


B. To increase the number of employee records displayed on the **‘Agency Roster’** screen, click the **‘Show Entries’** drop down.

C. **Showing 1 to X entries** - Indicates the number of ***‘Active Employees’*** in your agency roster. If the number of active employees displayed does not match your agency records – and your employees are paid by OSC, contact us as COELIGeducation@ethics.ny.gov.

D. **Column Sort -** Every column heading can be sorted by ascending or descending order. To change the sort order, click the column heading name – you may need to click the column several times to sort by different dates, etc.

E. **Filter records by Training Due Date -** Click the **'Filter'** icon to easily sort by **'Training Due'** date. Type 2025 in the **'Training Due Date'** field to view those employees who are due in 2025.



F. To export your current screen view into an Excel spreadsheet – click the **'Export'** button. The spreadsheet will automatically download from your web browser. From there, you can easily sort and filter employees that are missing email addresses, have completed training or need training.

Need help?
Email us at COELIGEducation@ethics.ny.gov.