

# 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.

The screenshot shows the SETA Dashboard with a navigation bar at the top containing: Submit Monthly Training Information, User, Employee, Schedule Training, Reports, Upload, and Search. The main dashboard area is titled "Dashboard" and contains several sections:

- Submit Monthly Training Information**, **Add Employee**, **Monthly Compliance Report**, and **Quarterly Compliance Report** buttons.
- Reports Due** section with a table:

Division of the Budget	12
QWE	0
Agency Test Account	6
Executive Chamber Executive Department	12
Roswell Park Cancer Institute	12
- Submissions from Previous Month** section with a search bar and a table showing "No data available in table".
- My Agencies** section (highlighted with a red box) with a search bar and a list of agencies with magnifying glass icons:

Name
Agency Parent Test Account
Agency Test Account
CUNY Graduate College
Department of Labor (NYS)
Division of the Budget
Executive Chamber Executive Department
Fishkill Correctional Facility C/O DOCCS
Franchise Oversight Board C/O DOB
QWE
Roswell Park Cancer Institute
- Delinquent Employees** section with a search bar and a table showing "Showing 1 to 10 of 143 entries".

2. From your Agency Profile:

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

The screenshot displays the 'View Agency: Office of the State' interface. It is divided into several sections:

- Agency Information:** A table with fields: Agency ID (000), Status (Active), Agency Name (Office of the State), Agency Display Name (Office of the State), Agency Care Of, Agency Acronym, Agency Type (Standard), Number of Employees (2763), Effective Date, Created By (IMPORT - 01/31/2024), and Modified By.
- Training Compliance Data:** A table with fields: Number of Employees (2763), Total Trained (2511), Total due to complete CETC (59), and Total due to complete Ethics Refresher (0).
- Agency Users:** A search interface with a search bar and a table listing users: Camille and Victor. It shows 'Showing 1 to 2 of 2 entries'.
- Employees:** A section with a 'Filter' button and a table with columns: Employee ID, First Name, Last Name, Email, Waiver, Extension, Ethics Training Due, and Ethics Training Comp. A red circle with the letter 'A' highlights the 'Manage' button. Below the table, it says 'Showing 1 to 1 of 1 entries (filtered from 2,763 total entries)'. There is also an 'Edit' button.

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](mailto: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.

The screenshot shows a web interface for 'Agency Roster: Office of the State'. At the top left is an 'Export' button. Below it is a 'Filter' section with a search box on the right. The filter options are: 'Compliant: All', 'Extension: All', 'Waiver: All', and 'Training Due Date: 2025'. A red box highlights the 'Clear' button, and a red arrow points to the '2025' input field.

- 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](mailto:COELIGEducation@ethics.ny.gov).