

The purpose of this 'How To' is to introduce the new process of running reports in Knowledge Link. The native reports in Knowledge Link are very powerful and include new features like filters which need to be understood in order to run accurate reports.

The table below indicates which new reports generally correspond to the old BEN Learning Management reports, which will be unavailable after October 9th.

We will have individual guides available for the several major reports.

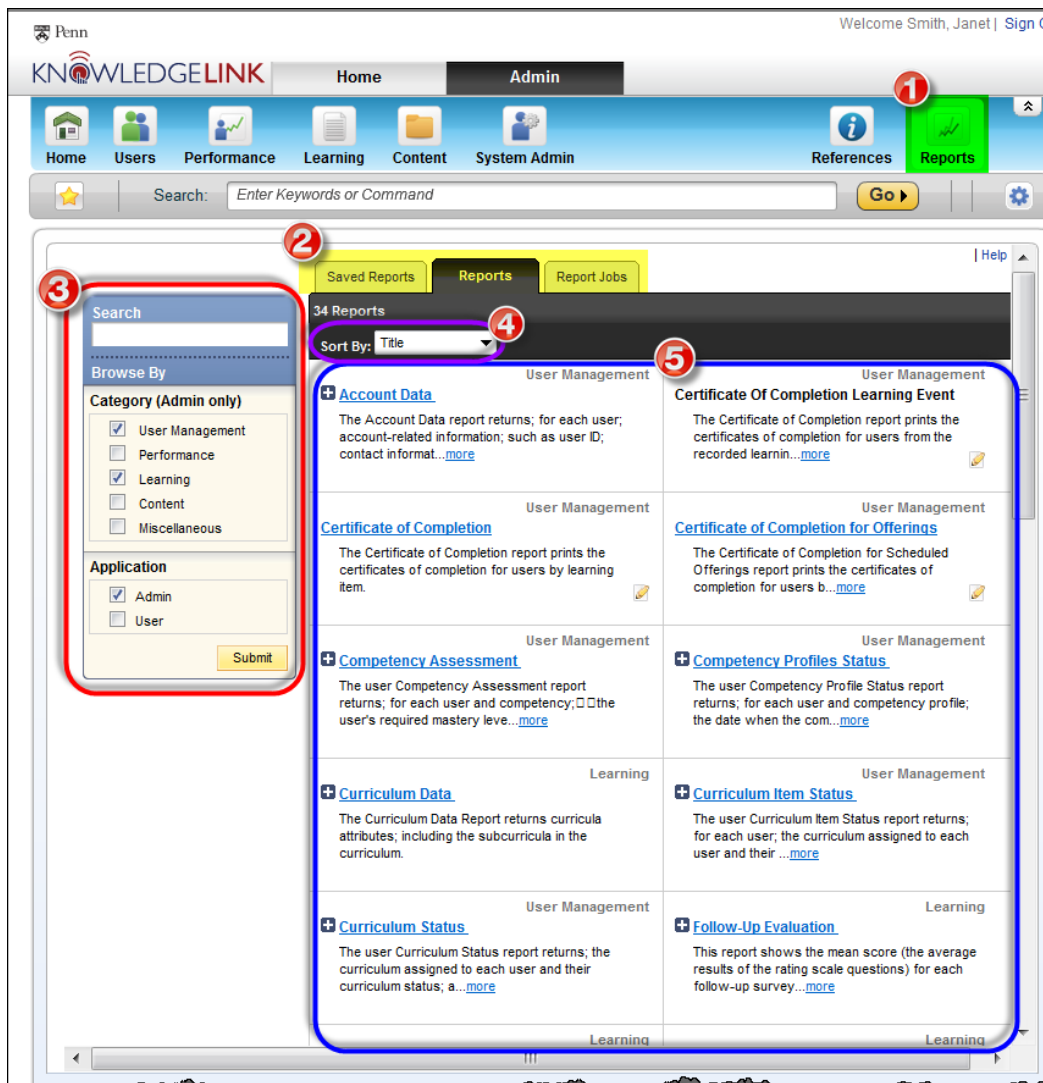
LEARNING MANAGEMENT REPORTS (old BEN Reports)	KNOWLEDGE LINK REPORTS NEW!!	WHAT YOU GET!
<ol style="list-style-type: none"> 1. Current Status of Required and Optional Courses, for the Org./Business Unit 2. Current Course by Trainee 3. Current Required Course Status, by Course 	<ul style="list-style-type: none"> • Learning Plan (for currently assigned, incomplete training as well as completed training that has periodicity or retraining requirements) • Learning History (for all completed training, whether there is periodicity or not and whether it was required or not) 	<p>User name, Penn ID, Item, Item Title, Required Date, Remaining Days, Assignment Type, Curriculum ID (if applicable), Complete Date (if completed with retraining need or periodicity)</p> <p>User name, Penn ID, Item, Item Title, Scheduled Offering ID (if applicable), Completion Date, Grade, Status</p>
<ol style="list-style-type: none"> 4. Current Required Course Status, by Course 	<ul style="list-style-type: none"> • Item Status (for checking completion by Item) 	<p>Item, Description (Item Title), User ID/Penn ID, User Name, Completion Date, Status</p>
<ol style="list-style-type: none"> 5. Class Roster – Required and Optional Courses 	<ul style="list-style-type: none"> • Scheduled Offering Roster (for checking who is in an instructor led course, creating a sign in sheet) 	<p>Scheduled Offering ID, Title, Item, Segment, Start Date/Time, End Date/Time, Instructor, Location, User Name, User ID/Penn ID, Supervisor, Supervisor ID/Penn ID, Signature space, Date space</p>
<p style="text-align: center;">CSV options are available for all of these reports so data can be downloaded and manipulated and shared.</p>		



Reports Screen in Knowledge Link

The new Knowledge Link makes available numerous reports from the Admin tab. We will briefly introduce the **Reports** screen.

1. Click on the **Reports** button while in the Admin tab to open the screen.
2. The screen contains 3 tabbed areas – **Saved Reports, Reports, and Report Jobs**.
 - a. **Saved Reports** contains only the reports that you yourself created and saved. You cannot share saved reports. (Generally you will be saving the filters and criteria for a report rather than the data pulled up.)
 - b. **Reports** is the most used tab where you can select, define, and run available reports in the LMS.
 - c. **Report Jobs** is the tab that lists your current scheduled report jobs that are automatically running in the background. (It is suggested that you run large, data-heavy reports after working hours.)
3. The **Search** and **Browse by** options help you search and browse for specific reports by title, description, or category. Usually the **User Management** and **Learning** categories will need to be checked.
4. You can use this feature to sort the available reports by **Category** or **Title**.
5. This is the main **Reports** tab content where you will find all of the reports available (or that you searched for) listed, depending on your criteria. *Scroll down to see all of them; there's lots!*



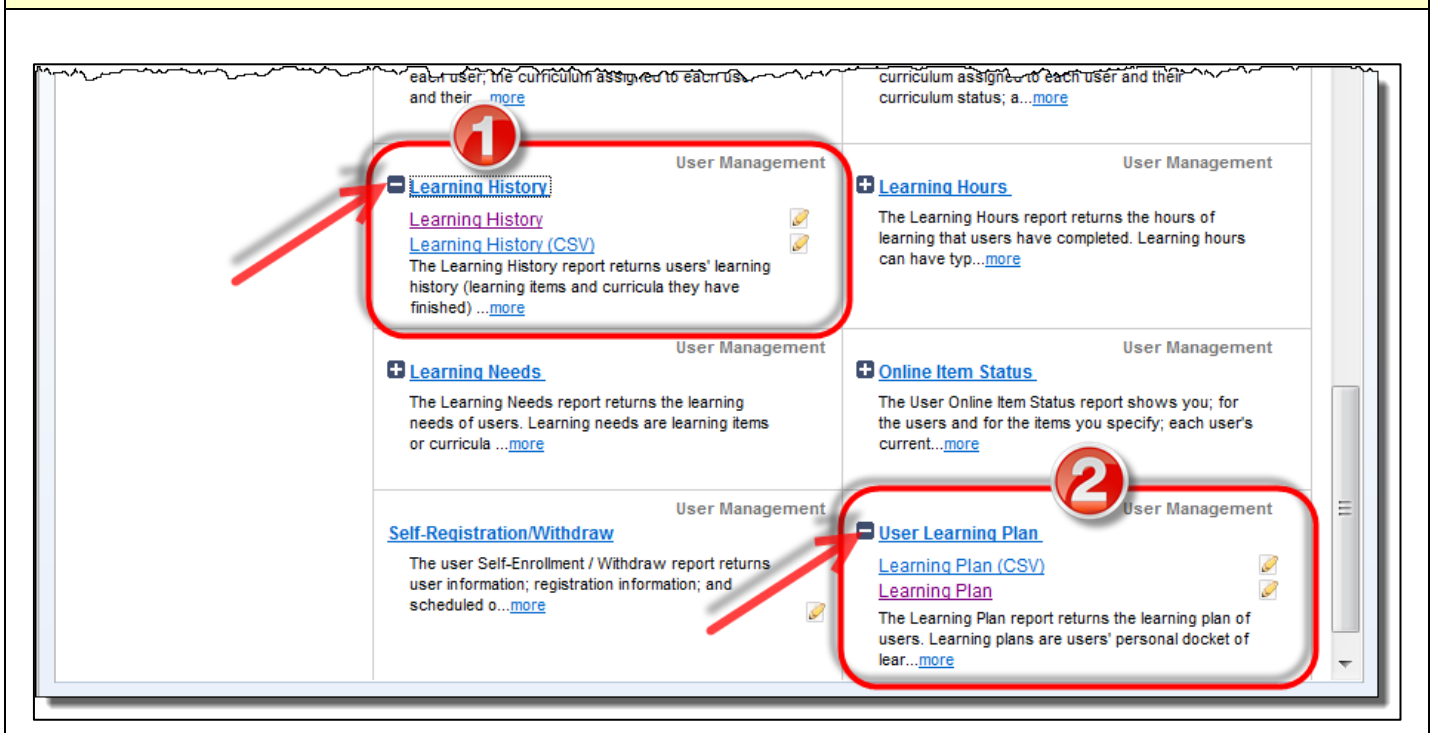
Learning History and User Learning Plan Reports

These two reports will probably be the most heavily used.

1. **Learning History** (for all past training whether the completion status is Complete, Substitute, Exempt, or Incomplete)
2. **User Learning Plan** (for currently assigned uncompleted training and training with a retraining interval)

You can expand the report options by clicking the small plus signs.

The CSV option allows you to download the data in a spreadsheet format for later manipulation or sharing.



Generally speaking you will follow these steps when running a report:

1. Select the **Admin** tab
2. Click the **Reports** button
3. Choose the category and report type
4. Choose the search criteria and elements to filter (items, or users, organizations, etc.)
5. Set up your filters making sure that you submit each one of them (there can be filters within filters so you have to be careful with these.)
6. Review the criteria for your report
7. Run the report (or decide to schedule it later if it involves a heavy amount of data)
8. Save the report criteria and filters so you don't have to rebuild it again
9. Set up a regular schedule to automatically run the report and email the results to you

Details of these steps will be laid out for each of the individual reports that we highlight.