

How to Run an Item Status Report

The purpose of this 'How To' is to walk you through the creation and running of an **Item Status** report.

- You would choose this report to check for completions by item.
- The report includes the following data:
 - Item,
 - Description (Item Title),
 - User ID/Penn ID,
 - User Name,
 - Completion Date,
 - Status
- A CSV option is available so data can be downloaded in order to be manipulated or shared.

This report takes the place of the following BEN report: Current Required Course Status, by Course



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

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Item Status

This report category is similar to the **Learning History** report. The **Learning History** reports give you the entire learning history for the user(s) you specify. The **Item Status** reports are designed to give you just the learning history for the item(s) you specify. (You can specify the user(s), too, if you like.) All of the **Item Status** reports include the same data. The first report groups the data by users; the second one, by items

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

The screenshot shows the Knowledge Link Admin interface. At the top, there is a navigation bar with 'Home', 'My Team', and 'Admin' tabs. Below this is a secondary navigation bar with icons for 'Home', 'Users', 'Performance', 'Learning', 'Content', 'System Admin', 'References', and 'Reports'. A search bar is located below the navigation bars. The main content area is titled 'Reports' and shows a list of 3 reports. The 'Item Status' report is highlighted with a red box. The 'Item Status' report has three sub-options: 'Item Status Group By Users', 'Item Status Group By Items', and 'Item Status (CSV)'. The 'Item Status' report description states: 'The User Item Status report returns; for each user and item; the user's completion status for the items they p...more'.

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PENN EXAMPLE: You need to select all temporary employees in ULAR and monitor their Penn Profiler requirement.

The upper section of the **Item Status Group by Items** form allows you to customize the report formatting. Enter your preferred report **Title**, **Header**, **Footer**, **Destination** (browser or local file), and **Format** (html or pdf).

The lower section of the form allows you to refine your search. We'll start with clicking the filter icon (blue funnel) for **User**.

TIP: Best practice would be to always click on the blue filter which offers you the widest variety of criteria for your report.

Item Status Group By Items | Browse | Help |

> Run Report

Run Item Status Group By Items

Report Title:

Report Header:

Report Footer:

Report Destination:

Report Format:

Case sensitive search: Yes No

Page Break Between Records

User:

Item:

Completion Status:

Completed Date From:

Completed Date To:

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The Users Filter For Item Status Group By Items, Search Users screen is displayed.

As you can see, your filtering criteria are numerous and include yet another layer of filters if you so choose. We're searching for ULAR temps, so the ULAR org number (**UP.8306**) is entered in **Organizations** and "temp" is entered in **Employee Statuses** with the operator "Contains".

Users Filter For Item Status Group By Items

Item Status Group By Items

Filter: 0 Users

Users Filter For Item Status Group By Items

Create the filter using the search below. The search is case sensitive by default. You can choose case insensitive search which applies to criteria typed in. Be aware of case insensitive search could take long time.

Search Users

Case sensitive search: Yes No

User ID: Starts With

Last Name: Starts With

First Name: Starts With

Middle Initial: Starts With

Role ID: Starts With

User Status: Active Not Active Both

Profile Status: Active Expired Both

Organizations: Starts With

Items Completed: Exact Type: ID:

For Credit: For Credit Not For Credit No History

Items Needs: Exact Type: ID:

Employee Statuses: Contains

Job Codes: Starts With

Supervisors: Starts With

Position ID: Starts With

Native Deeplink User: Yes No Both

Add/Remove Criteria

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The **Users Filter For Item Status Group By Items, Select Users from List** screen is displayed.

We searched for ULAR temps and there were 41 total records.

1. Make sure the **Records per Page** setting is larger than the number of records.
2. Click **Select All**. (This will ONLY select those records on the page and that's why you need to check the **Records per Page** setting. You can tweak these by unchecking some if you need to.)
3. Click **Add to Filter**.
4. Notice that the filter now shows **"Filter: 41 Users"**. Click **Submit Filter**. **YOU MUST CLICK THE SUBMIT FILTER BUTTON TO ACTUALLY CREATE THE FILTER!!**

Users Filter For Item Status Group By Items

Item Status Group By Items

Select Users from list

As you select records to include in your filter, they will appear in the Filter List. Select **Submit Filter** when ready to submit the filter and return to your base search criteria

<< Search Again

Records per Page: 50 (41 total records)

Filter: 41 Users Submit Filter


Add to Filter Reset

User ID	User Name	Job Location	Organization ID	Select
5		UNIVERSITY	UP.8306	<input checked="" type="checkbox"/>
4		UNIVERSITY	UP.8306	<input checked="" type="checkbox"/>
3		UNIVERSITY	UP.8306	<input checked="" type="checkbox"/>
3		UNIVERSITY	UP.8306	<input checked="" type="checkbox"/>
3		UNIVERSITY	UP.8306	<input checked="" type="checkbox"/>
5		UNIVERSITY	UP.8306	<input checked="" type="checkbox"/>
3		UNIVERSITY	UP.8306	<input checked="" type="checkbox"/>

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After clicking the **Submit Filter** button, we have returned to the main screen for **Run Report** and you can see that the user filter selected 41 people. (To clear the filter, click on the outlined funnel and to revise the filter, click on the solid funnel.)

Next we will click the **Items** filter to set the filter for the Penn Profiler. Enter “**profiler**” in the **Item Title** box with the operator “**Contains.**” Click **Search**.

Case sensitive search: Yes No
 Page Break Between Records
User: [41 Selected] 
Item: Exact Type: Course
ID:
Completion Status: Exact
Completed Date From: (MM/DD/YYYY)
Completed Date To: (MM/DD/YYYY)
Run Report Schedule Job Save Report Reset

Items Filter For Item Status Group By Items
Item Status Group By Items
Filter: 0 Items Submit Filter
Items Filter For Item Status Group By Items
Create the item filter using the search below. The search is case sensitive by default. You can choose case insensitive search which applies to criteria typed in. Be aware of case insensitive search could take long time.
Search Items
Search Submit Criteria Reset
Case sensitive search: Yes No
Search All Locales: Yes No
Item Types: Starts With
Item ID: Starts With
Item Title: Contains profiler
Item Status: Active Not Active Both
Item Classification: Starts With

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The search returns only the Penn Profiler.

1. Click the select checkbox.
2. Click **Add to Filter**.
3. Click **Submit Filter**. (Note that the expanded filter shows the Penn Profiler.) **YOU MUST CLICK THE SUBMIT FILTER BUTTON TO ACTUALLY CREATE THE FILTER!!**

Items Filter For Item Status Group By Items

Item Status Group By Items

Filter: 1 Items **Submit Filter**

Select Item from List

As you select records to include in your filter, they will appear in the Filter List. Selected records will return to your base search criteria

<< Search Again

2 Add to Filter Reset

Item ID	Title	Select
COURSE UP.91028.ITEM.PROFILER (Rev '1' - 8/7/2012 12:00 AM America/New York)	PennProfiler-Required Training Assessment-VPR	<input checked="" type="checkbox"/>

Select All / Deselect All

Add to Filter Reset

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1. Note that the **Item** filter is now active too.
2. Enter the correct **Completed From** and **To** dates for the time span that you need.
3. Click **Run Report** and you will see a status screen asking you to "Please wait..."

You also have the options of **Schedule Job**, **Save Report** and **Reset** buttons. *We will discuss scheduling and saving in another guide.*

Case sensitive search: Yes No

Page Break Between Records

User: [41 Selected]

Item: [1 Selected] **1**

Completion Status: Exact

Completed Date From: (MM/DD/YYYY) 01/01/2012 **2**

Completed Date To: (MM/DD/YYYY) 06/30/2012 **2**

3 **Run Report**

Please wait...

Report Title: Item Status Group By Items

Status: Waiting in Queue

Your report is in the queue and will start automatically as long as you do not close this page. (If you close the page, the report will be automatically cancelled.) If you do not wish to wait on this page for your report, you can choose one of the options below.

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Below is the resulting report with the following information:

- **Item**
- **Description**
- **User ID**
- **User Name**
- **Completion Date**
- **Status**

This particular report only shows completions of the Penn Profiler, so we can see that out of 41 ULAR temps, only 10 completed Profiler within the time span that we requested.

Item Status Group By Items

Items

Item : COURSE UP.91028.ITEM.PROFILER (Rev '1' - 8/7/2012 12:00 AM America/New York)
Description : PennProfiler-Required Training Assessment-VPR

Users

User ID	User Name	Completion Date	Status
		5/18/2012 12:00 AM America/New York	Complete
		5/4/2012 12:00 AM America/New York	Complete
		2/29/2012 12:00 AM America/New York	Complete
		2/26/2012 12:00 AM America/New York	Complete
		1/10/2012 12:00 AM America/New York	Complete
		6/25/2012 12:00 AM America/New York	Complete
		5/22/2012 12:00 AM America/New York	Complete
		3/21/2012 12:00 AM America/New York	Complete
		6/11/2012 12:00 AM America/New York	Complete