

How to Run a Scheduled Offering Roster Report

The purpose of this 'How To' is to walk you through the creation and running of a **Scheduled Offering Roster** report.

- You would choose this report to check who is in an instructor led course and to create a sign in sheet.
- The report includes the following data:
 - 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
- 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: Class Roster – Required and Optional Courses.



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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Scheduled Offering Roster

PENN EXAMPLE: You would like to print out a sign in sheet for your upcoming class of Species Specific Hands On Straining – Mouse, held on 9/10/12.

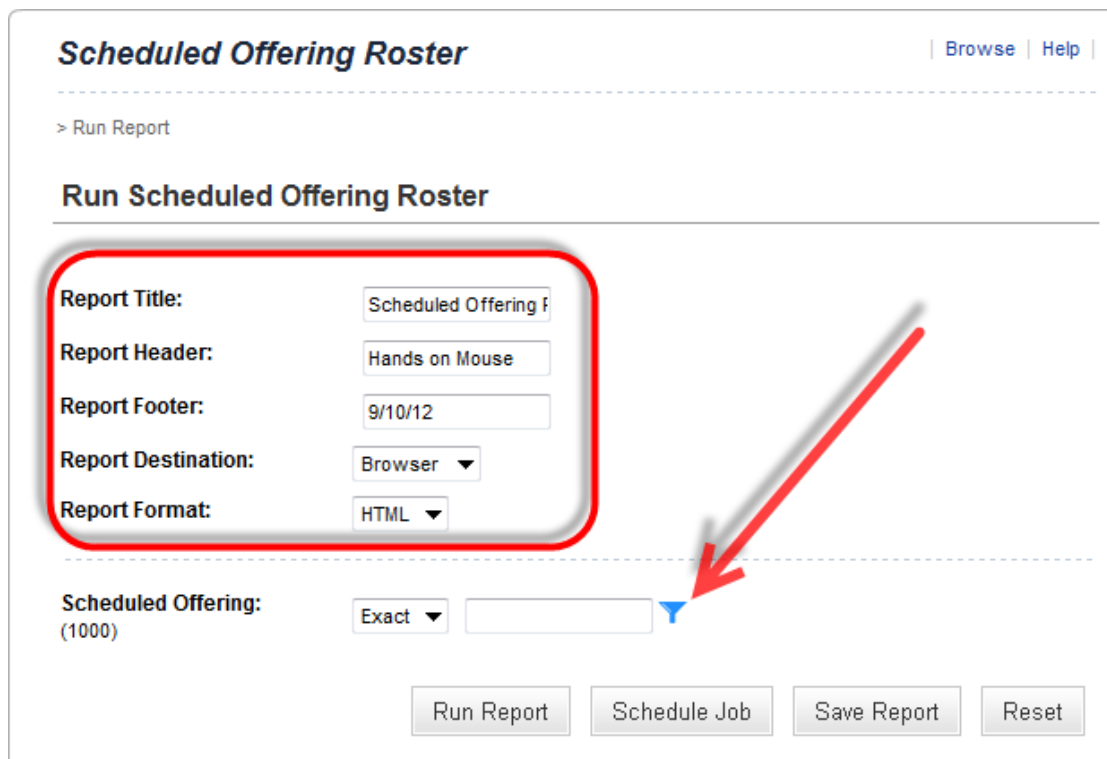
Instructors often need to print out a class roster before meeting with their students. This report meets that need. Click on the **Scheduled Offering Roster** link if you want to merely print out a roster. The CSV option allows you to download the results.

Registration Status The Registration Status report returns; for offerings and users;a detailed list of registration information in... more	Schedule Offering Data The Scheduled Offering Data report returns detailed information about each schedule offering including the ite... more
Scheduled Offering Roster Learning Scheduled Offering Roster (CSV) Scheduled Offering Roster The Scheduled Offering Roster report returns the roster of users in a scheduled offering.	Substitute Relationship Learning The Substitutes Relationship report returns; for each learning item; the item for which a substitute relations... more
Account Data User Management The Account Data report returns; for each user; account-related information; such as user ID; contact informat... more	Certificate Of Completion Learning Event User Management The Certificate of Completion report prints the certificates of completion for users from the recorded learnin... more

How to Run a Scheduled Offering Roster Report

The first section of the **Scheduled Offering Roster** 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).

Since it is unlikely that you know the **Scheduled Offering ID** (an arbitrary ID number), click on the filter option.



The screenshot shows the 'Scheduled Offering Roster' form. The form is titled 'Scheduled Offering Roster' and has a 'Browse | Help' link in the top right corner. Below the title is a '> Run Report' link. The main section is titled 'Run Scheduled Offering Roster'. The form contains several input fields and dropdown menus:

- Report Title:** Scheduled Offering F
- Report Header:** Hands on Mouse
- Report Footer:** 9/10/12
- Report Destination:** Browser (dropdown)
- Report Format:** HTML (dropdown)
- Scheduled Offering:** (1000) Exact (dropdown) [input field]

A red arrow points to the blue filter icon (a small triangle) next to the input field for the Scheduled Offering ID. At the bottom of the form are four buttons: 'Run Report', 'Schedule Job', 'Save Report', and 'Reset'.

How to Run a Scheduled Offering Roster Report

The **Scheduled Offerings Filter for Scheduled Offering Roster**, **Search Scheduled Offering** screen displays.

You know that you want to find the hands on mouse **Scheduled Offering** and you know the exact date, 9/10/12.

- Enter “**mouse**” with the operator of “**Contains**” in the **Description** field.
- Enter the date “**9/10/2012**” in both date fields.

This information will allow you to pinpoint the correct **Scheduled Offering**.

Click **Search**.

Scheduled Offerings Filter For Scheduled Offering Roster

Search Scheduled Offerings

Search Submit Criteria Reset

Case sensitive search: Yes No

Search All Locales: Yes No

Offering Type: Item offering type Schedule Block offering type Both

Scheduled Offering ID: Starts With

Item/Schedule Block ID: Starts With

Description: Contains

Start Date After: (MM/DD/YYYY)

Start Date Before: (MM/DD/YYYY)

Status: Active Not Active Both

Add/Remove Criteria

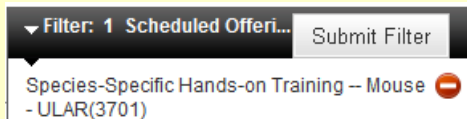
Search Submit Criteria Reset

How to Run a Scheduled Offering Roster Report

The **Scheduled Offerings Filter** for Scheduled Offering Roster, Select Scheduled Offering from list screen displays.

Your search results show only one **Scheduled Offering** with that date so you know it's the one you need. *(Notice that it doesn't display the date of the offering, which is why you needed it for your search. Otherwise you can't distinguish one Scheduled Offering of an Item from another!)*

1. Click on the **Select** checkbox to the right.
2. Click **Add to Filter**.
3. Notice that the filter area in the upper right now contains "**1 Scheduled Offering**" and you can expand it by clicking on the triangle to the left of the word "Filter" and see the name of the offering



4. You MUST click **Submit Filter** to activate the filter.

Scheduled Offerings Filter For Scheduled Offering Roster

Scheduled Offering Roster

Filter: 1 Scheduled Offeri... Submit Filter

Select Scheduled Offerings 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

Add to Filter Reset

Scheduled Offering ID	Title	Item/Schedule Block	Select
3701	Species-Specific Hands-on Training -- Mouse - ULAR	COURSE UP.83019.ITEM.SSHOTM (Rev '1' - 8/7/2012 12:00 AM America/New York)	<input checked="" type="checkbox"/>

Add to Filter Reset

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After clicking the **Submit Filter** button, you return to the main screen for the **Scheduled Offering Roster** report and can see that you have an active filter. (To clear the filter, click on the outlined funnel and to revise the filter, click on the solid funnel.)

Click **Run Report** and below you can see what your roster would look like. Remember that it appears in a new browser window, which you can print.

Scheduled Offering Roster | [Browse](#) | [Help](#) |

> Run Report

Run Scheduled Offering Roster

Report Title:

Report Header:

Report Footer:

Report Destination: ▼

Report Format: ▼

Scheduled Offering: (1000) [1 Selected] ▼ ▼



Schedule				
Scheduled Offering ID	3701			
Title	Species-Specific Hands-on Training -- Mouse - ULAR			
Item	COURSE UP.83019.ITEM.SSHOTM (Rev 8/7/2012 12:00 AM America/New York)			
Segment	Start Date/Time	End Date/Time	Instructor	Location
1 Species-Specific Hands-on Training -- Mouse - ULAR	9/10/2012 10:00 AM America/New York	9/10/2012 11:00 AM America/New York		Anatomy Chemistry: ULAR Training Room
User Name	Supervisor	Signature	Date	
SMITH, MITT	12345678			
SMITH, JOE	23456789			
SMITH, MICHELLE	34567891			
9/10/12 Sep 11, 2012 10:42 AM				