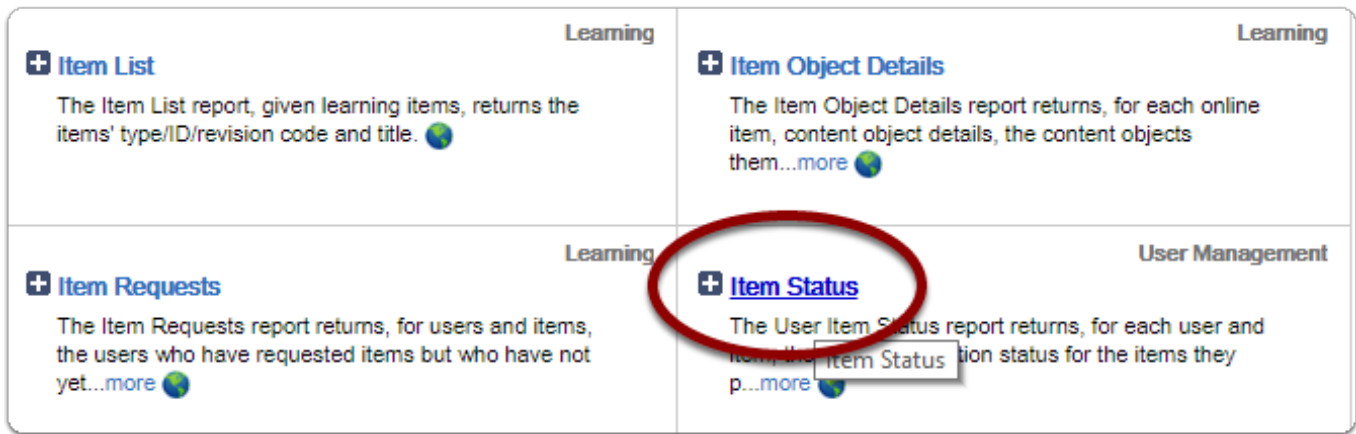


1. Navigate to Learning admin from the Learning menu
2. Click the Reports button from the Admin tab to get started.



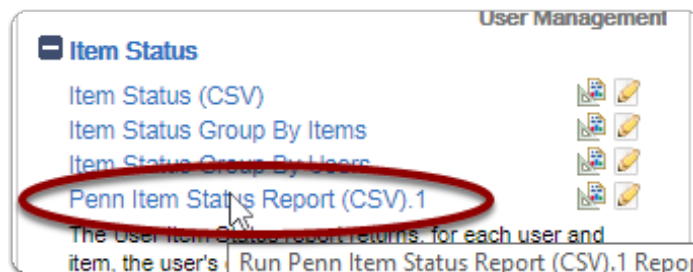
3. Scroll down to the Item Status reports.

Note: If you do not see Item Status, try searching by keyword in the upper left, or check/uncheck the boxes to see more reports. You may have a previous selection saved.



4. Toggle Item Status to see the reports below. Select Penn Item Status Report (CSV).

Not familiar with .csv files? Don't worry! They all open in Microsoft Excel and other spreadsheet programs



5. You will now see a prompt to Run Penn Item Status Report.

The top options are settings for the output format. You can typically leave these as default.

Run Penn Item Status Report (CSV).1

Report Destination: Local File

Report Format: CSV

CSV Report Delimiter: Comma (,)

These can be left as default

6. These are your search options below:

1. **User** = Person or persons by ID, name, organization, job code etc.
2. **Item** = Course or courses by ID, title, course owner etc.
3. **Completion Status** = COURSE-COMPLETE or other
4. **Completed Date From/To** = Date range the user(s) completed the course(s).

Case sensitive search: Yes No

User: 1 Exact [] []

Item: 2 Exact Type: [] ID: []

Completion Status: 3 Exact []

Completed Date From: 4 (MM/DD/YYYY) []

Completed Date To: (MM/DD/YYYY) []

7. Finding users: Click the blue funnel next to the User search box

If you know the ID(s), please paste it separated by commas in the box and skip to step 8

Case sensitive search: Yes No

User: Exact [] []

Item: Exact Type: [] ID: []

Completion Status: Exact []

7.1 Searching for Users by Organization: Click the blue funnel

Organization can be a school, center, or department within either. If you don't see Organizations listed as an option, click **Add/Remove Criteria** and check the box for Organizations to add it to your view.

Profile Status: Active Expired Both
Organizations: Starts With
Employee Types: Starts With

7.2 Searching for Organizations: By Organization ID

Organization ID is useful if you know the start of or the entire ID. All university organizations start with "UP:" [Note the "."] All organizations in the same school or center start with the same two digits e.g. "UP.91" (ISC). Type in the code and click Search.

Organization ID: Starts With **1**
Description: Starts With
Organization Type: Starts With **1**
Organization Group: Starts With **1**
Domains: Starts With **1**
Add/Remove Criteria [➔](#) **2**

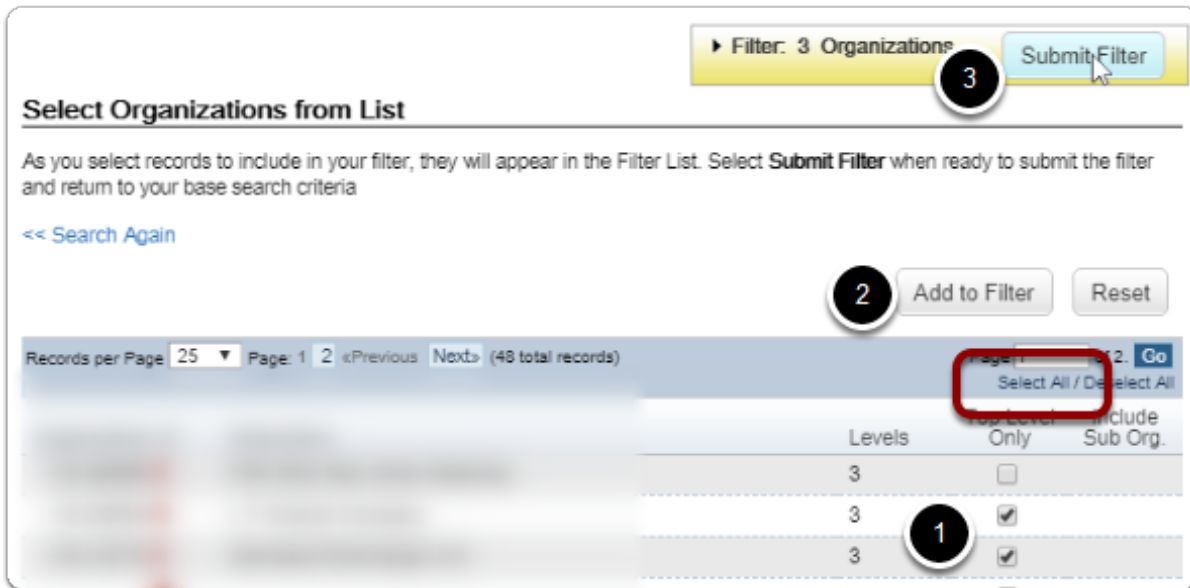
7.3 Searching for Organizations: By Description

1. Search by keyword (e.g. "dental", "vet", or "development".)
2. Click **Search**

Case sensitive search: Yes No
Organization ID: Starts With
Description: **1** Contains
Organization Type: Starts With **1**
Organization Group: Starts With **1**
Add/Remove Criteria [➔](#) **2**

7.4 Select the organizations you need

If you need all in your search, click **Select All** or use checkboxes to pick individual organizations. (*Too many pages to select all? Change the Records per Page from the default 25 to higher to see more at once.*)

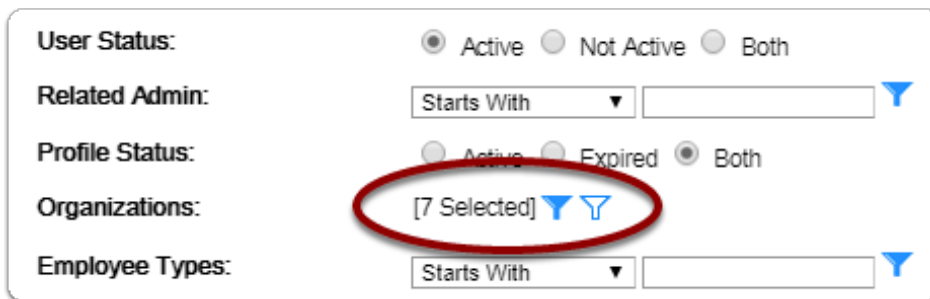


7.5 Click Add to Filter and Submit Filter

If you clicked select all make sure if you have multiple pages to click to the next page and select all for those as well.

7.6 You should now be back to the user window with organizations selected on the screen.

Skip to Step 13.



7.7 Searching for users with Employee Types, Job Codes, Supervisors, etc.

Please use the same steps you would as when searching by Organizations. **Always remember to Add to Filter what you want to search by and Submit Filter.**

7.8 Once you have your user filters set up, click Search to be able to select with the check boxes or Select All

7.9 Select users, Click Add to Filter, Click Submit Filter

Check individual boxes OR if you want all the users:

1. Change **Records per Page** to 500
2. Click **Select All**

Note: you may have to do this for multiple pages of users if your search returned more than 500.

Select 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: 500 (305 total records)

User ID	User Name	Job Location	Organization ID	Select
		UNIVERSITY	UP.9142	<input type="checkbox"/>
		UNIVERSITY	UP.9157	<input type="checkbox"/>

Buttons: Add to Filter, Reset, Submit Filter

8. You will now have Users Selected as shown below:

Note: If you made a mistake, click the white funnel and start over at step 6.

Case sensitive search: Yes No

User: [305 Selected]

Item: Exact Type: ID:



Completion Status: Exact


Completed Date From: (MM/DD/YYYY)


9. If you know the ID for a single Item to report, please paste it in the Item ID box and skip to step 11.

Course IDs are formmatted like UP.COURSEOWNER.ITEM.COURSEID

Case sensitive search: Yes No


User: [305 Selected]  

Item: Exact Type: **ID: UP.91028.ITEM.KLUplc **

Completion Status: Exact 

Completed Date From:

10. Searching for Items: Click the blue funnel to begin

Item: Exact Type: 

ID:

10.1 If you are looking for courses from one provider you can search by Item ID (Starts With).

Item Types: Starts With 

Item ID: Starts With UP.40006.ITEM.

Revision Date: (MM/DD/YYYY)

10.2 If you are looking for courses by name, use the Item Title box, change the menu to Contains and search by keyword

This helps when you don't know the exact course title.

Revision Number: Starts With

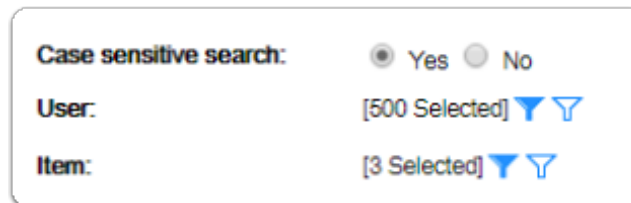
Item Title: Contains step up

Item Status: Active Not Active Both

10.3 Check the boxes for the desired courses, (or Select All). Click Add to Filter, and Submit Filter.

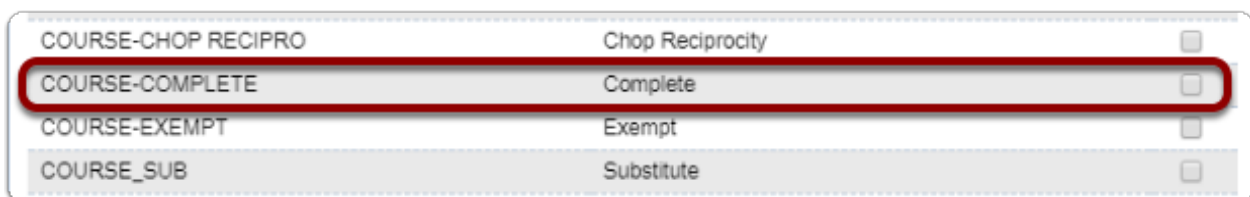


11. You should now have Items selected on the original search screen



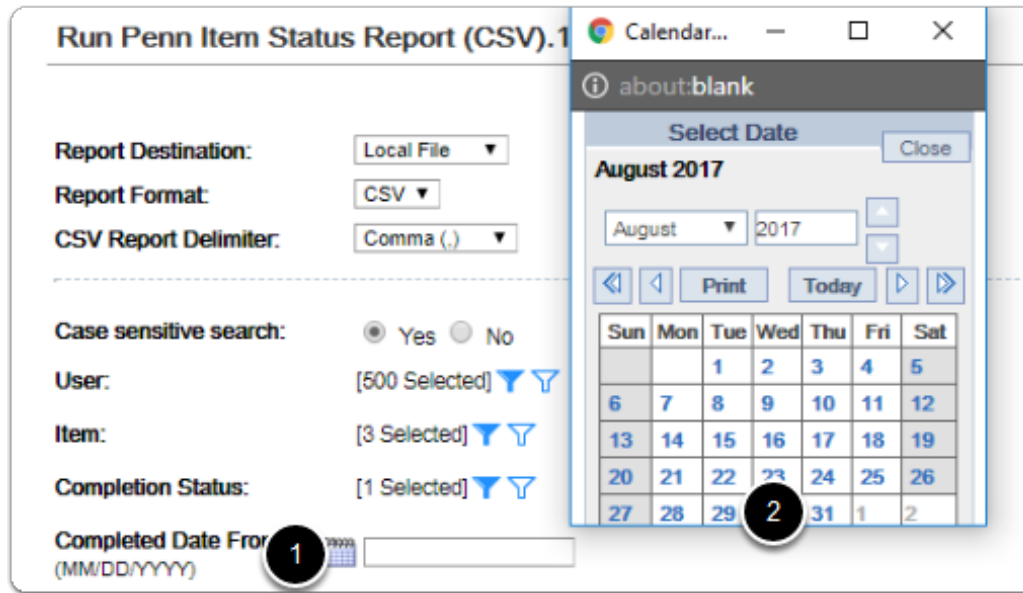
12. To filter by Completion Status click the blue funnel (Optional)

Typically we are looking for COURSE-COMPLETE. You may have to scroll down to see the completion status you want. Check your status(es), Click Add to Filter and Submit Filter.



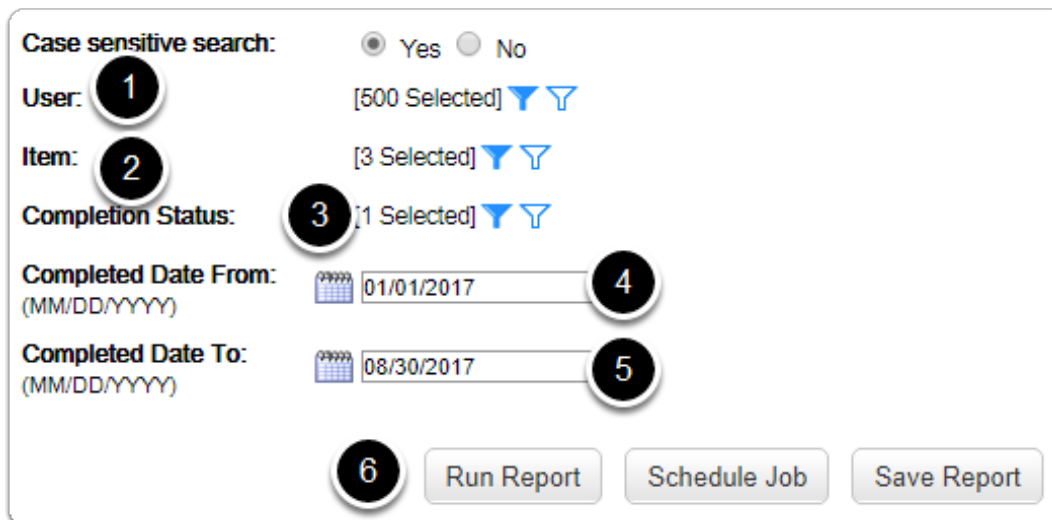
13. Searching by Completion Date From/To (Optional).

Use the calendar menus to select a date for **From** and **To**. Typically people search a date range, or limit to the past fiscal year to report completions for an annual or monthly report.



14. Check your work before you Run, Schedule, or Save the Report.

1. Do you have users selected?
2. Do you have courses?
3. Is/are the completion status(es) selected? (Optional)
4. Are your dates correct? (Optional)



15. The report will run. Keep the window open.

When it reads "Succeeded", check your downloads folder for the report.

Please wait...

Report Title **Penn Item Status Report (CSV).1**

Status **Succeeded**

Your report has completed and will now begin downloading automatically.

16. Open your report.csv in Excel or another program to view it.