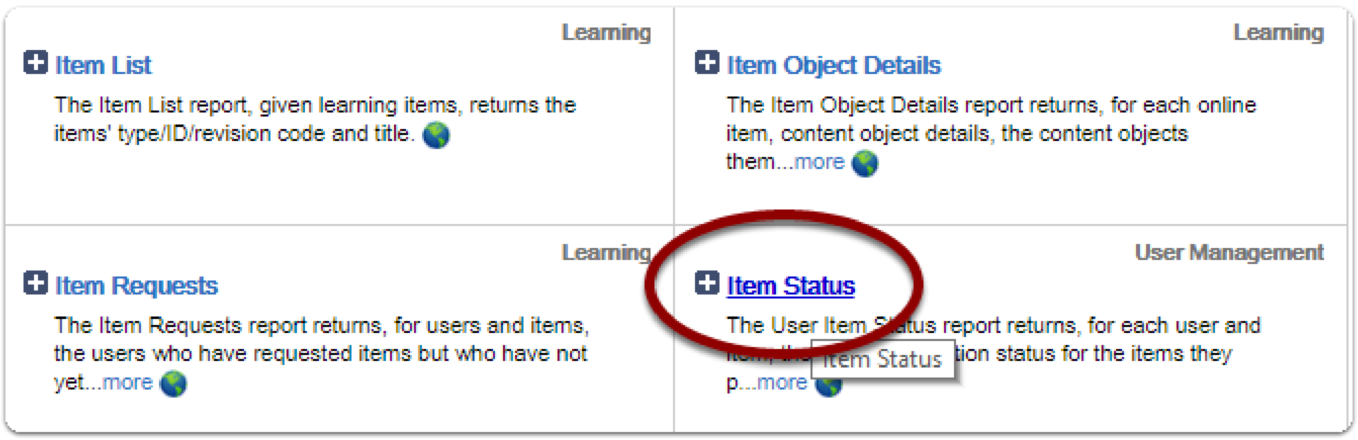
## 1. Navigate to Learning admin from the Learning menu

## 2. Click the Reports button from the Admin tab to get started.

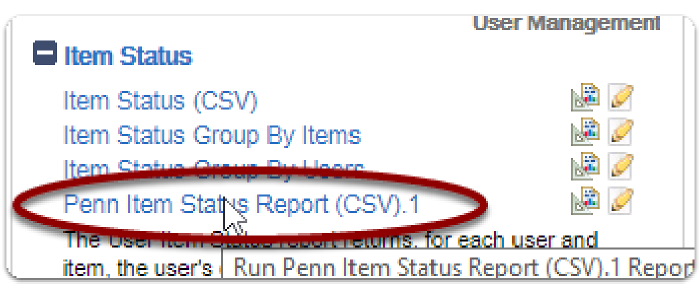

## 3. Scroll down to the Item Status reports.

*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.*



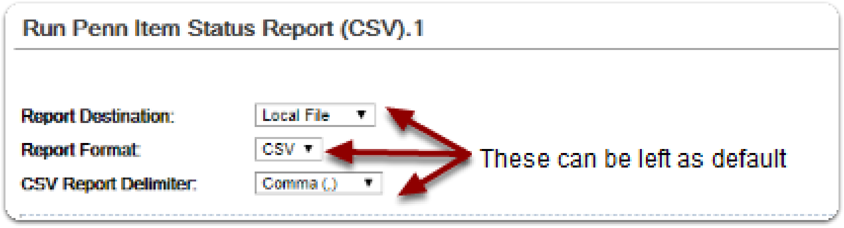

## 4. Toggle Item Status to see the reports below. Select Penn Item Status Report (CSV).

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



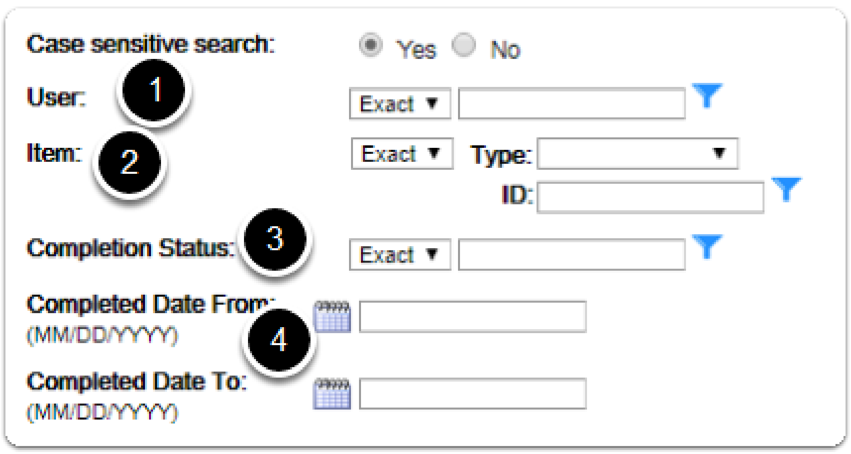

## 5. You will now see a prompt to Run Penn Item Status Report.

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



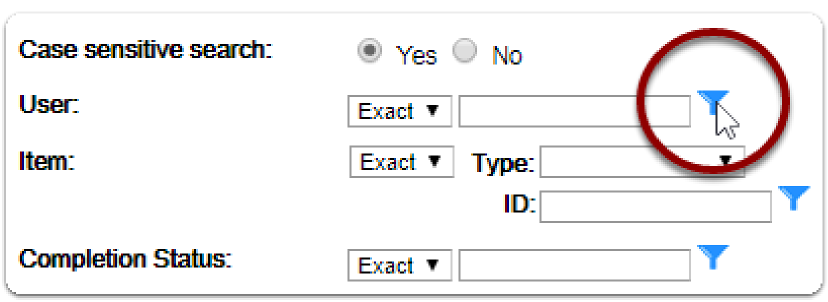

## 6. These are your search options below:

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).




## 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

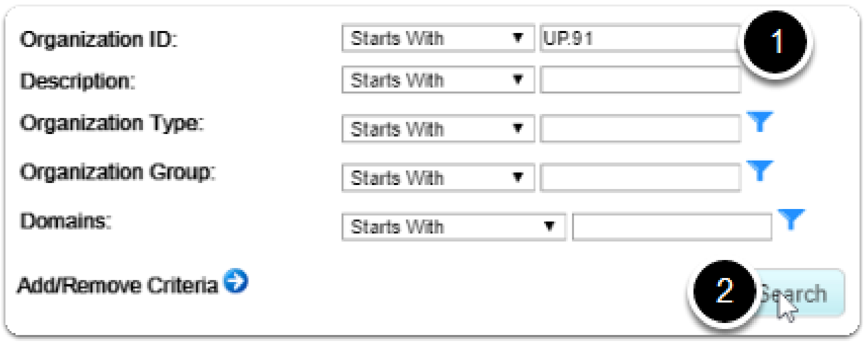



## 7.1 Searching for Users by Organization: Click the blue funnel

*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.*


### 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.

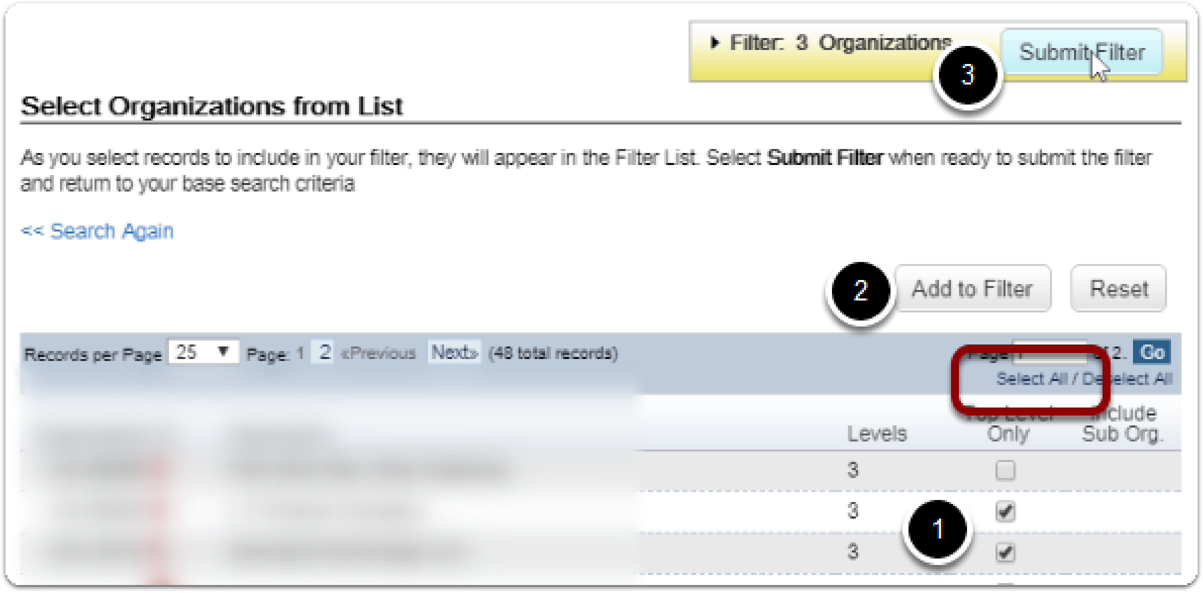



### 7.3 Searching for Organizations: By Description

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


### 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.)*

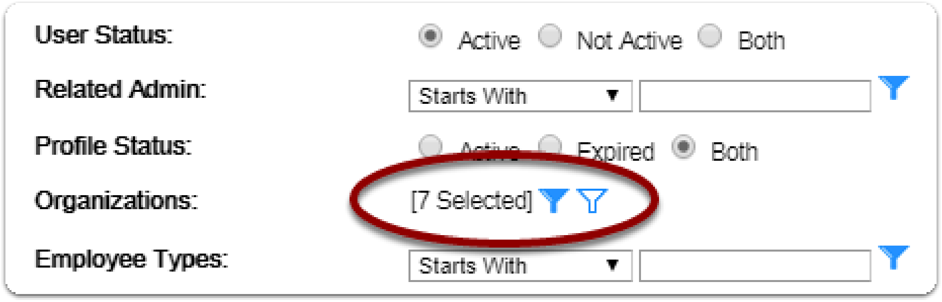


### 7.5 Click Add to Filter and Submit Filter

*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.**

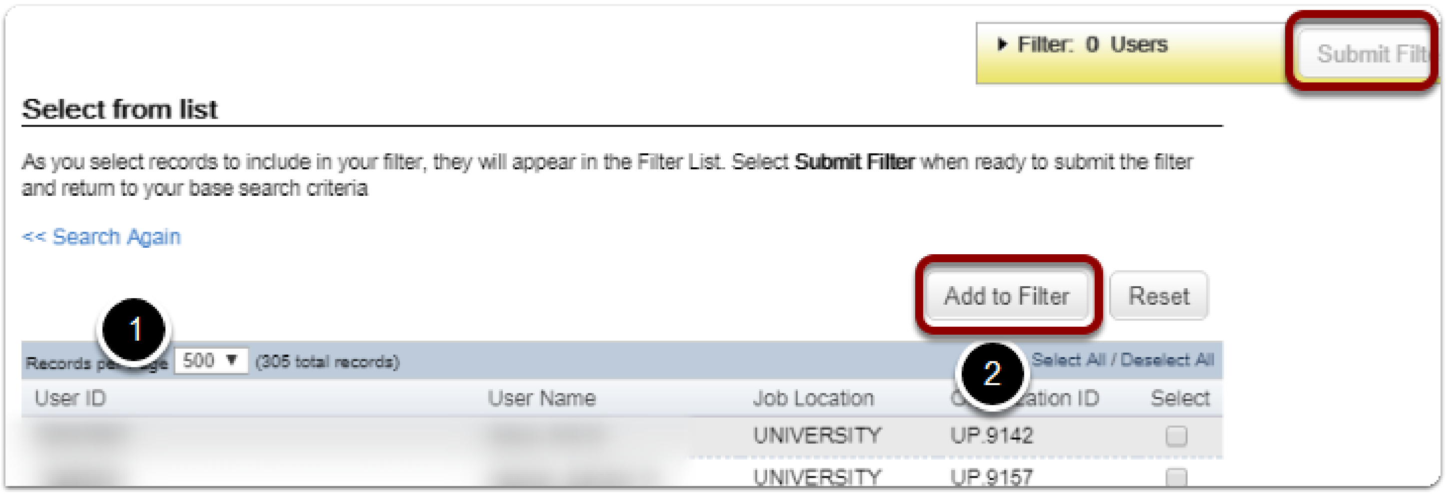
### 7.8 Once you have your user filters set up, click Search to be able to select with the check boxes or Select All

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

Check individual boxes OR if you want all the users:

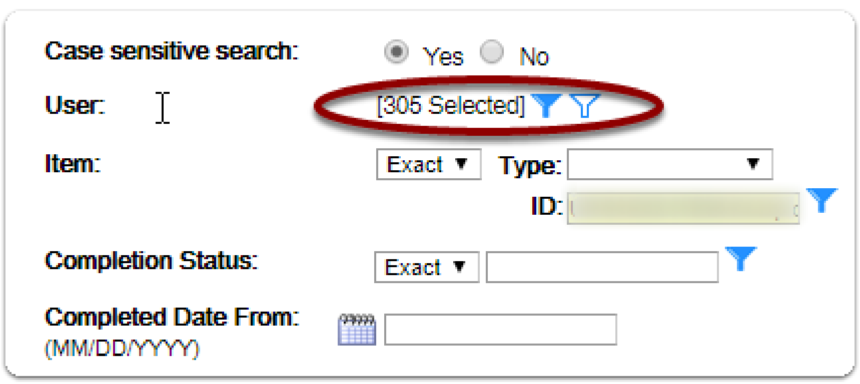
1. Change **Records per Page** to 500
2. Click **Select All**

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



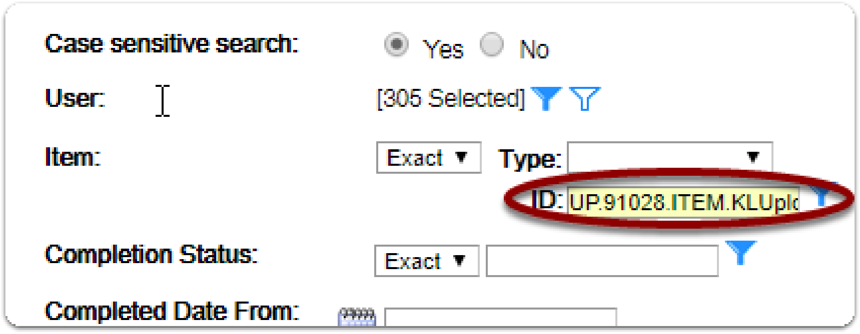

### 8. You will now have Users Selected as shown below:

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



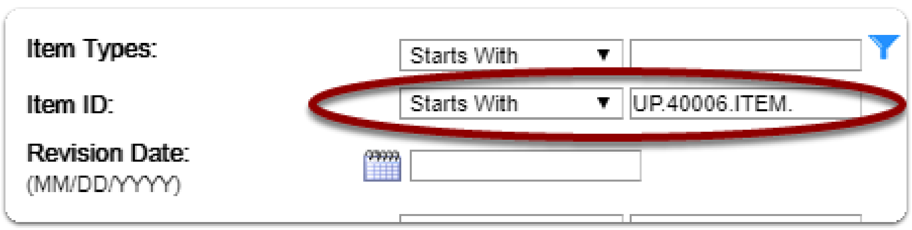

### 9. If you know the ID for a single Item to report, please paste it in the Item ID box and skip to step 11.

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




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

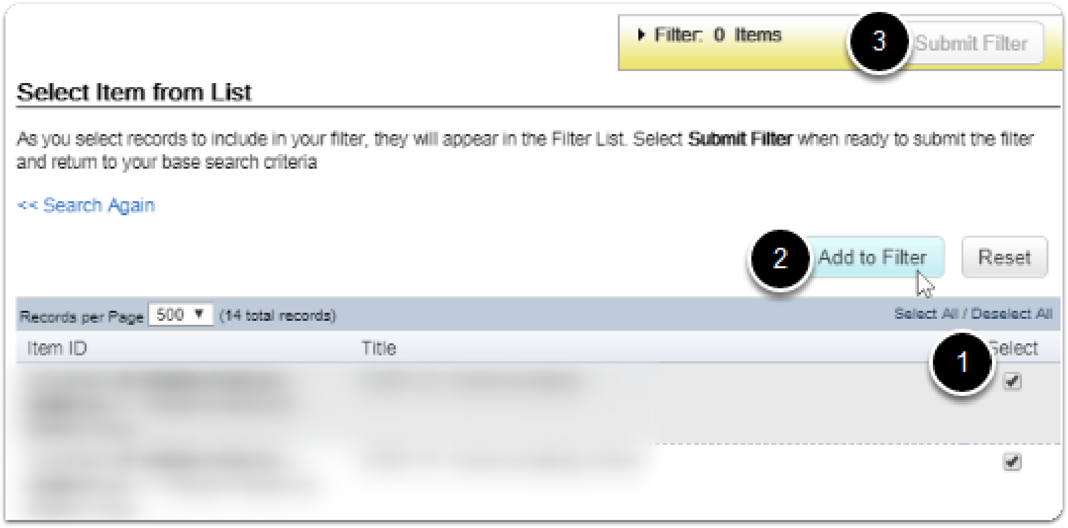

### 10.1 If you are looking for courses from one provider you can search by Item ID (Starts With).



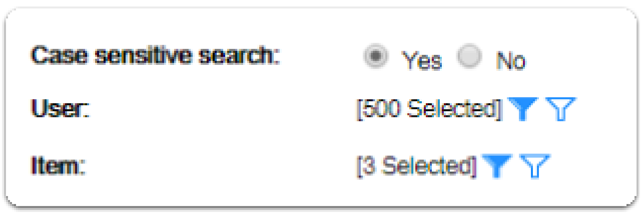

### 10.2 If you are looking for courses by name, use the Item Title box, change the menu to Contains and search by keyword

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

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

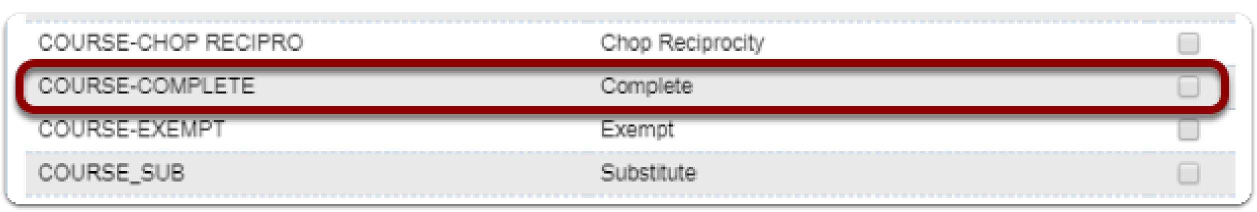



### 11. You should now have Items selected on the original search screen



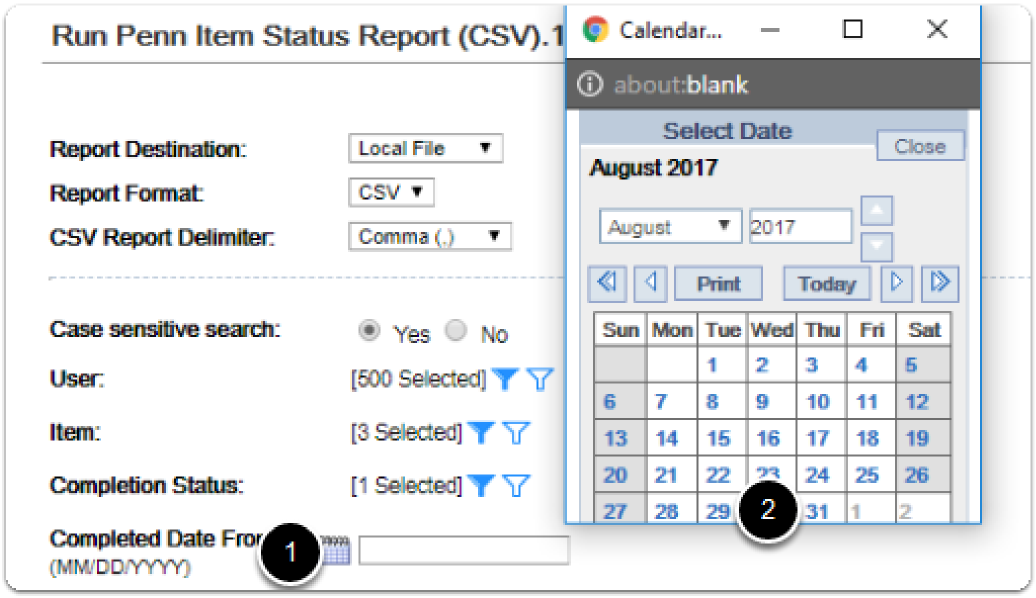

### 12. To filter by Completion Status click the blue funnel (Optional)

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.



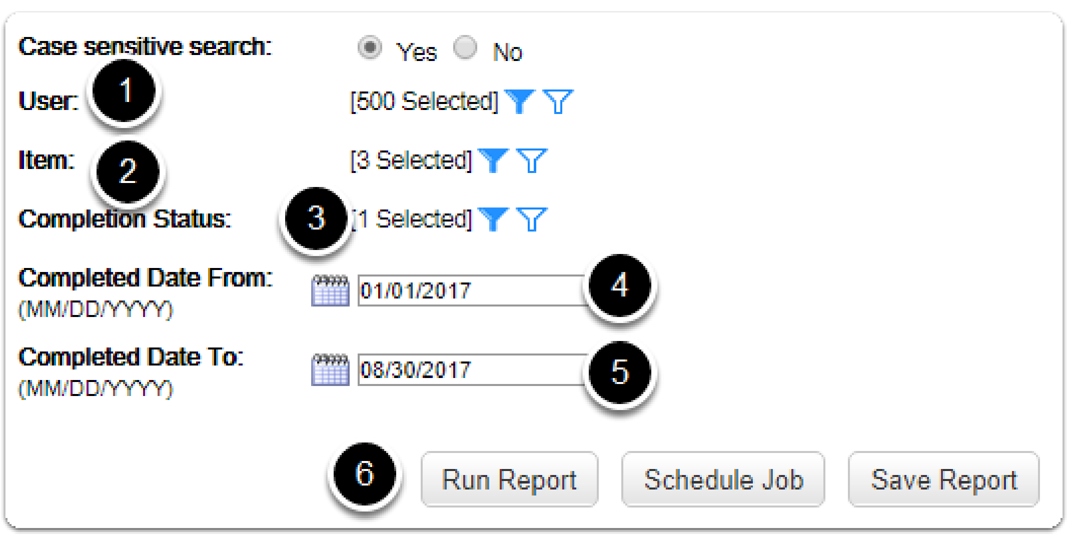

### 13. Searching by Completion Date From/To (Optional).

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.



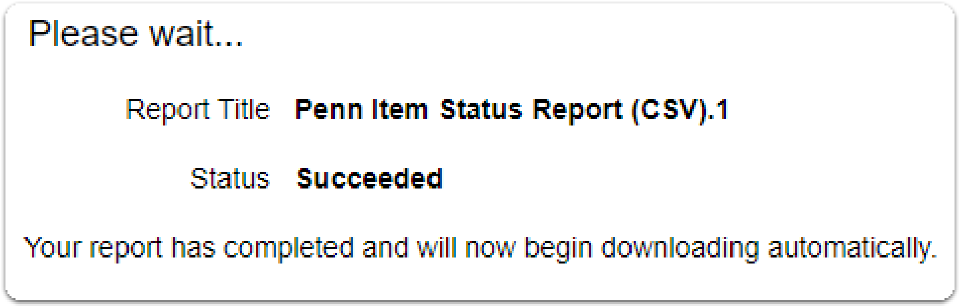

## 14. Check your work before you Run, Schedule, or Save the Report.

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.




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