

Required fields:

All fields required to run the report will be circled in red like the oval below. For running reports on multiple users or multiple items, you may want to use the other field to narrow down your search so that your report is not too large. For example, if you are running curriculum item status for more than one person, you may want to limit yourself to only the curricula that interest you (All university curricula, or those provided by one group eg. ULAR).



"Who is(not) compliant with HIPAA/FERPA/Aseptic Technique?"

Most compliance courses are housed in a "Curriculum" requiring training annually or cyclically. Curriculum status as complete/incomplete tells you not only whether or not they've completed these items, but whether or not they need to again.

Curriculum Status vs. Curriculum Item Status

The only difference between Curriculum Status and Curriculum Item Status are that Item status includes individual rows reporting on the multiple items in each curriculum. Keep in mind this can multiply and lengthen your report rapidly. If you don't need this detail, it is easier to report Complete/Incomplete information with just Curriculum Status.

Curriculum Item Status

This report only has one required field, either User OR Curriculum.

- Only User selected: pulls all curricula assigned.
- User and Curriculum: queries user's status for one curriculum
- Can run many users' status for one or more curricula
- Can run with just curriculum: LARGE FILE ALERT

Case sensitive search:	<input checked="" type="radio"/> Yes <input type="radio"/> No
User:	Exact ▾ <input type="text"/>
User Status:	<input checked="" type="radio"/> Active <input type="radio"/> Not Active <input type="radio"/> Both
Curriculum:	Exact ▾ <input type="text"/>
Include:	<input type="checkbox"/> Subcurricula

Curriculum Status

This report only has one required field, either User OR Curriculum.

- Only User selected: pulls all curricula assigned.
- User and Curriculum: queries user's status for one or more curricula
- Can run many users' status for one or more curricula
- Can run with just curriculum: LARGE FILE ALERT

The screenshot shows a filter form for the Curriculum Status report. It includes the following fields:

- User:** A dropdown menu set to "Exact" and an empty text input field with a blue search icon.
- Curriculum:** A dropdown menu set to "Exact" and an empty text input field with a blue search icon.
- Include:** A checkbox labeled "Subcurricula" which is currently unchecked.
- Include:** A checkbox labeled "Indirect Assignments" which is currently unchecked.

"What courses are in Knowledge Link about X or Y?"

Item Data allows you to find the courses in the system so you can run reports. This is useful if there are many courses you need to report on and you're not sure which one is the correct one.

Item Data

This report only requires the Item field.

- Can search for items by catalog (eg. "How many EHRs courses are in the UPHS catalog?" or "How many HIPAA courses are in the PSOM catalog?")
- Returns fields including: course owner, delivery method, assignment default, contact email, active status, catalog, legacy course information, description etc.

The screenshot shows a filter form for the Item Data report. It includes the following fields:

- Case sensitive search:** Radio buttons for "Yes" (selected) and "No".
- Item:** A dropdown menu set to "Exact", a "Type:" dropdown menu, and an "ID:" text input field with a blue search icon.
- Catalog ID:** A dropdown menu set to "Exact" and an empty text input field with a blue search icon.

"Who completed Item X? It was a one-time course"

Why might you want Item Status? If someone completed items many times while remaining compliant, or if the item is not used with a curriculum.

Item Status

"How many/which courses did my department/division complete in the last 12 months?"

Learning History

This report is great for returning an Organization or multiple Organizations' learning history in one sheet

- How many training courses did Person X complete this past year?
- How many courses did all of my department complete this year?
- What courses did my school complete this quarter?

Learning Needs

This report returns all the items on people's learning plans including:

- Required vs. Optional
- Required date (due date)
- Item title/ID and other info
- Required date options weed out things due far in the future (AlertDriving, CITI training etc.)

This report answers questions like "Who in the university still has this pending training?"

User: Exact ▼ ▼

Item: Exact ▼ **Type:** ▼

ID: ▼

Required Date From:
(MM/DD/YYYY)

Required Date To:
(MM/DD/YYYY)

"Who is enrolled and waitlisted for this scheduled offering? I need to contact them or make a list."

You can print a PDF roster directly from a Scheduled Offering, but if you want to be able to copy/paste emails or get supervisor data, you will need to get an Excel version (csv). It is also useful to see what instructors and locations are assigned which scheduled offerings in one Excel sheet. (this information is also in a Learning Calendar report, but does not include a roster).

Penn Scheduled Offering Roster CSV

Scheduled Offering: Exact ▼ ▼

Status: Active Not Active Both

To find a scheduled offering, search by Item ID, Title, or words in the Description (Remember to toggle to Contains as shown below)

For offerings in the past, adjust or delete the start date.

Case sensitive search: Yes No

Search All Locales: Yes No

Scheduled Offering Type: Item offering type Schedule Block off

Scheduled Offering ID: Starts With

Item/Schedule Block ID: Starts With

Description: **Contains**

Title: Starts With

Start Date After: (MM/DD/YYYY)

Start Date Before: (MM/DD/YYYY)

User Learning Plan

Case sensitive search: Yes No

User:

"I develop online courses. What content objects are currently matched with my items?"

This report returns what content objects are attached to each item. This is most useful when you have online content being reused, or if there are multiple objects attached to a single item.

Item Object Details

Case sensitive search: Yes No

Item:

ID:

Item Status: Active Not Active Both

When searching for multiple items, make your life easier by filtering out scheduled offerings.

Search All Locales:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Item Types:	Starts With <input type="text"/>
Item ID:	Starts With <input type="text" value="up.91028"/>
Revision Date: (MM/DD/YYYY)	<input type="text"/>
Revision Number:	Starts With <input type="text"/>
Item Title:	Starts With <input type="text"/>
Item Status:	<input checked="" type="radio"/> Active <input type="radio"/> Not Active <input type="radio"/> Both
Item Classification:	Starts With <input type="text"/>
Online Settings:	<input checked="" type="checkbox"/> Has online content
Course Owner:	Starts With <input type="text"/>
Assignment Profiles (Assigned Items):	Starts With <input type="text"/>
Orders Enabled:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both