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).

Report types:

Whenever possible, use a PENN custom report:

"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

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

"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 - Penn Item Data CSV

This report only requires the Item field.
Can search for items by library (e.g. "How many EHRS courses are in the UPHS library?" or "How many HIPAA courses are in the PSOM library?")
Returns fields including: course owner, delivery method, assignment default, contact email, active status, library, legacy course information, description etc.

"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 - Penn Item Status Report CSV**

"How many/which courses did my department/division complete in the last 12 months?"
**Learning History (CSV)**

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?

![Case sensitive search:](image)

**Learning Needs (CSV)**

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:](image)

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

You can print a PDF roster directly from a class, 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 classes in one Excel sheet. (this information is also in a Learning Calendar report, but does not include a roster).
Penn Class Roster CSV

To find a class, search by Item ID, Title, or words in the Description (Remember to toggle to Contains if you are not certain of the exact information as shown below)

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

PENN User Learning Plan

This reports everything on someone(s) Learning Plan.
User Learning Plan

"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
When searching for multiple items, make your life easier by filtering only courses with online content.