KNOWLEDGELINK

This job aid provides steps for compliance reporting in Knowledge Link.

Types of Compliance Reporting

A compliance report consists of two parts: (a) who was assigned the course and (b) who has or has not completed it. Since courses may be assigned in Knowledge Link in various ways, there are various ways to report compliance. These are the most common ways to report compliance:

- **Managers Checking Employee Compliance:**
  Use the My Team Dashboard. The dashboard shows compliance for all assigned learning for the manager's employees – including courses that are overdue, due within 30 days, or due within 60 days. If there is no due date, the course will not appear on the dashboard. Managers may also delegate My Team tasks to an employee. *For instructions on the dashboard or delegation, see "For Managers and Delegates" guides at this location.*

- **Administrators Checking Compliance when courses are assigned by curriculum:**
  Use the "PENN Curriculum Item Status (CSV).2" report. For this report, administrators can choose a group of users and one or more curricula to see who has or has not completed it. This report is valid only for courses that are assigned as part of a curriculum. *Click here to jump to the instructions.*

- **Administrators Checking Compliance for any course, whether or not it is assigned by curriculum:**
  Use the "PENN User Learning Plan by Item (CSV)" report. For this report, administrators can choose a specific course or courses to see who has the course(s) on their learning plan, and who has or has not completed the course(s). This report is valid for courses that are assigned as part of a curriculum or assigned as an individual item. The course may have been assigned automatically, assigned by an administrator, assigned by a supervisor, or self-assigned (with or without a due date). *Click here to jump to the instructions.*

Other notes:

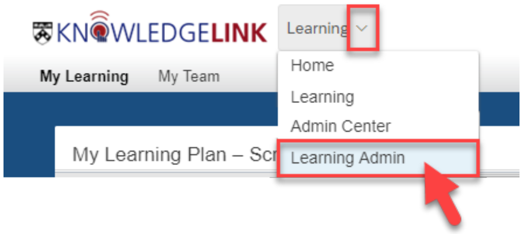
- Running administrator reports on a large number of people, for a large number of courses, can cause system slow-downs affecting all Knowledge Link users. The following is a guideline that we ask all KL administrators to adhere to: *multiply the number of courses by the number of people expected in the report*. If the result is over 30,000, we ask administrators to schedule the report to run at off-peak times (11pm-6am). Also, do not check the box to email the report to yourself or others. The report will likely be too large to email.

- For instructions on scheduling reports, see the job-aid titled "Running Reports (including commonly used reports)" at this location.

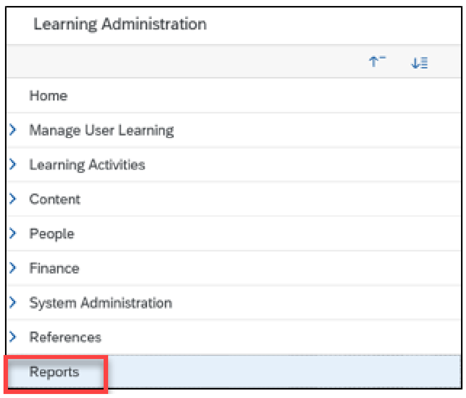
How to Run the "PENN Curriculum Item Status (CSV).2" Report

1. Be sure to have the curriculum ID(s) and/or the assignment profile ID(s) that you wish to report. If you don't have the IDs, contact your entity's lead KL administrator or the person that requested the assignment.

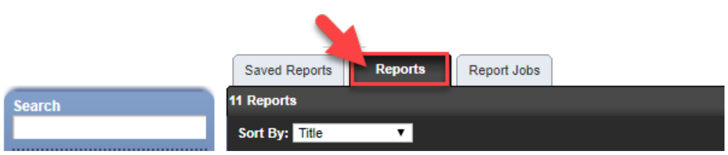
2. Log into Knowledge Link and, from the main menu, click the down arrow, then click **Learning Admin**.



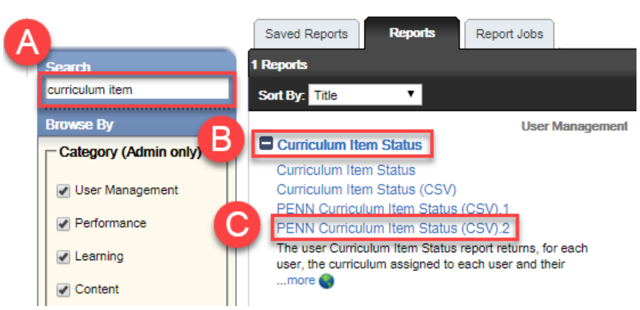
3. From the Learning Administration page, click **Reports**.



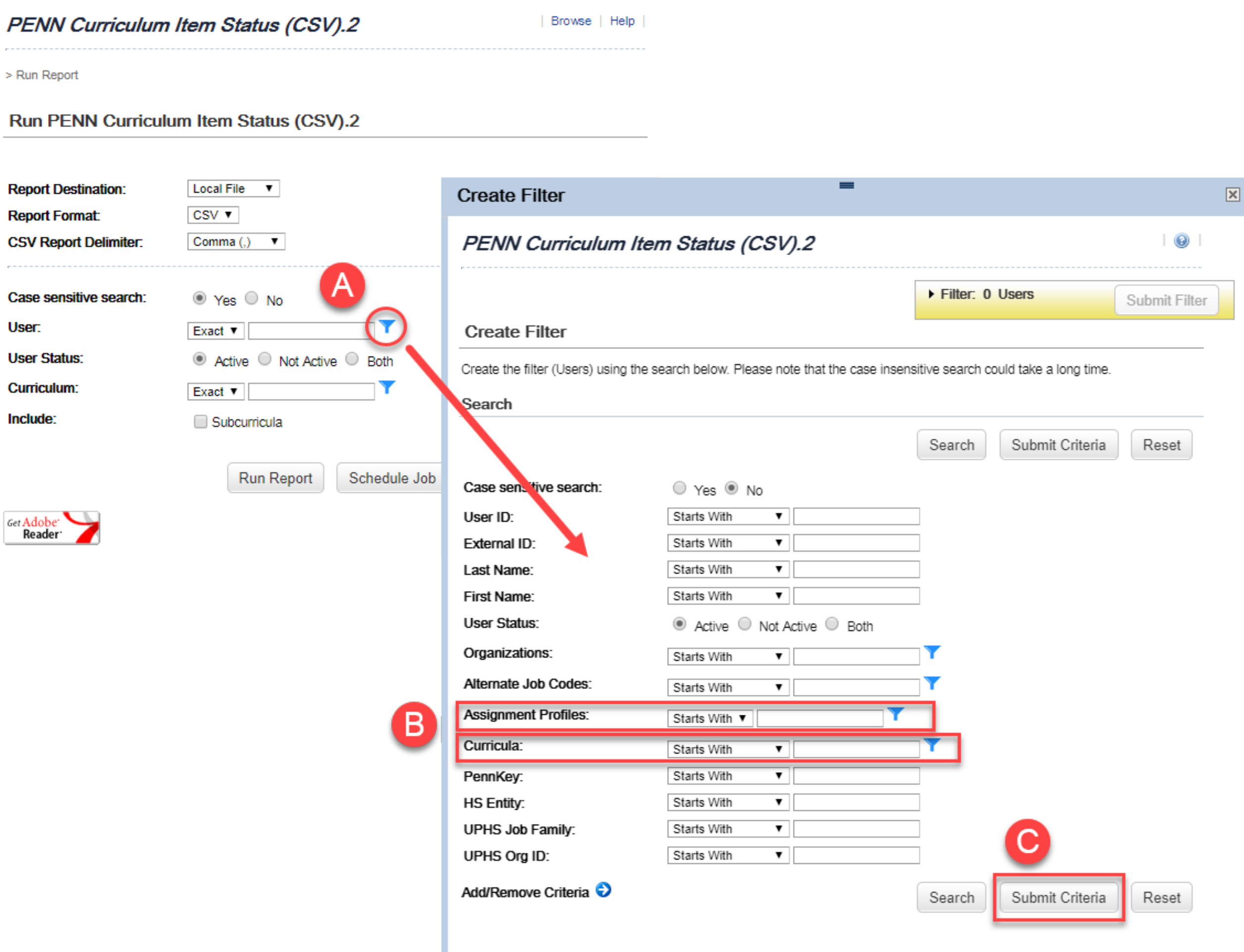
4. On the Reports page, select the **Reports** tab.



5. In the Reports window:
   A. Type "curriculum item" in the Search box and press **Enter**.
   B. Click the heading "Curriculum Item Status".
   C. Click the report title "PENN Curriculum Item Status (CSV).2".

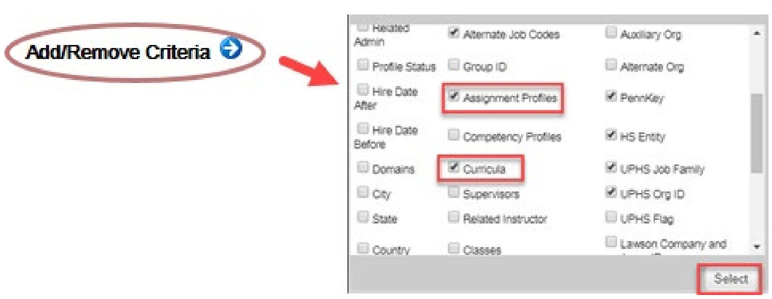


6. Follow the steps below:
    A. Select the blue filter button for **User**.
    B. Put the **Assignment Profile ID** in the Assignment Profiles field (preferred)
    -- OR --
    Put the **Curriculum ID** in the Curricula field
    C. Click **Submit Criteria**.

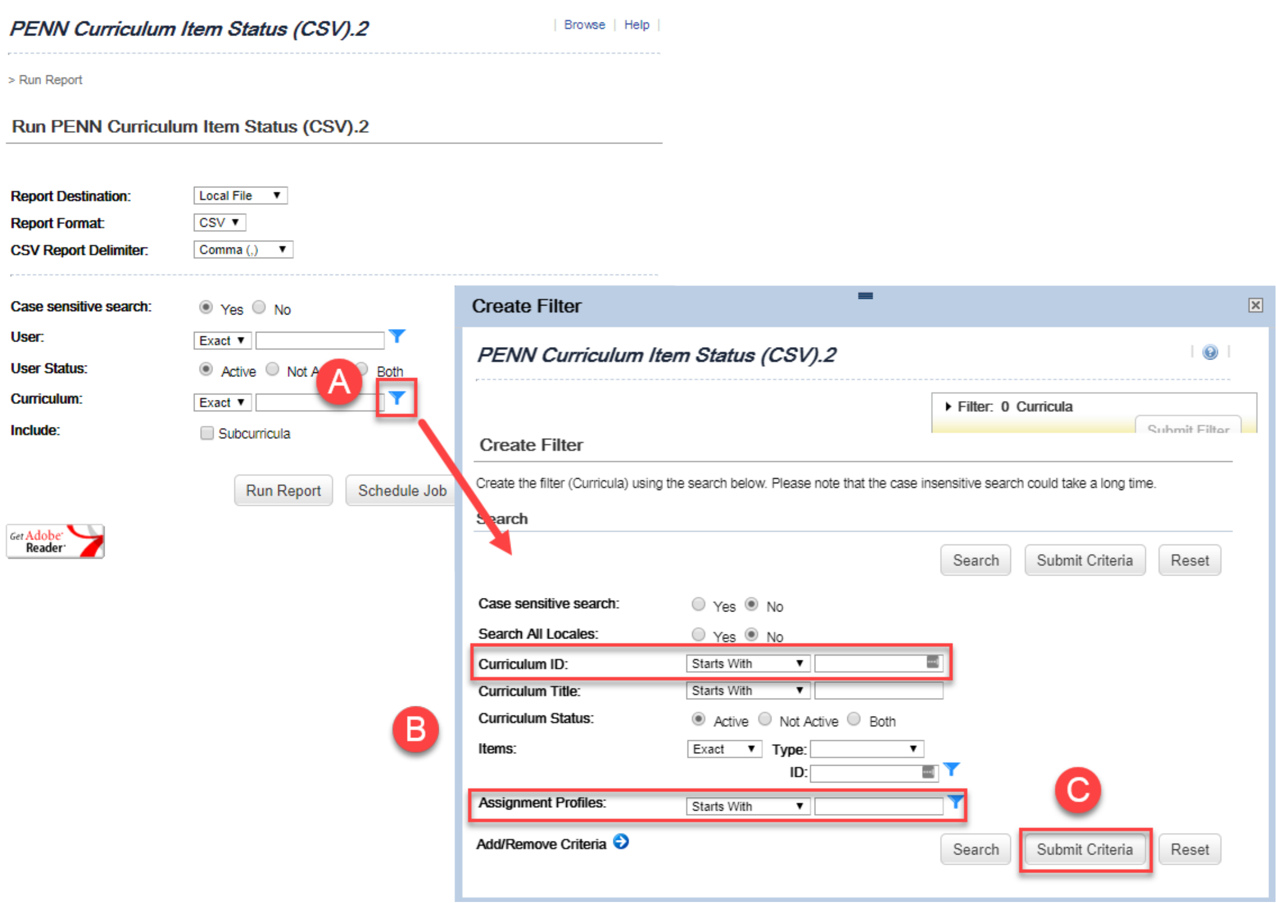


TIP:

If you do not see “Assignment Profiles” or “Curricula” in your search window, click **Add/Remove Criteria**, select those checkboxes, then click **Select**.

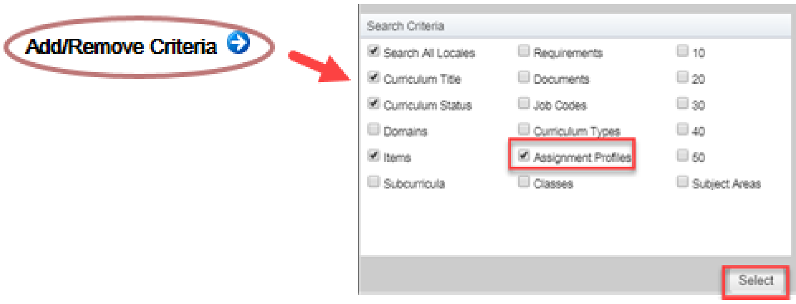


7. Follow the steps below:
    A. Select the blue filter button for **Curriculum**.
    B. Put the **Assignment Profile ID** in the Assignment Profiles field (preferred)
    -- OR --
    Put the **Curriculum ID** in the Curriculum ID field
    C. Click **Submit Criteria**.



TIP:

If you do not see "Assignment Profiles" in your search window, click **Add/Remove Criteria**, select the checkbox, then click **Select**.



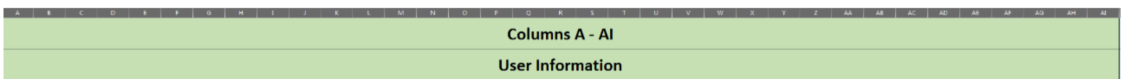
8. When all your criteria are selected, click **Run Report**.
   For help on other options, see the "Running Reports (including commonly used reports)" job-aid at [this location](#).

9. When the report finishes, it will download to your computer or you will be prompted to save and/or open the report (depending on your browser).

10. Locate the report on your computer and double-click to open it. The report will open in Excel.

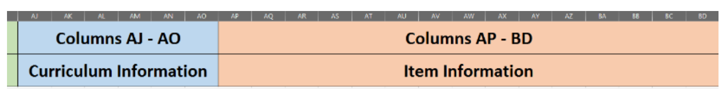
11. Once the report opens, immediately save it as an Excel document. Select **Excel Workbook** in the "Save as type" box.

12. This report will show compliance details for each user, each curriculum, and each item (course) that the user is assigned. The relevant columns in this report are:



This section contains all user info including Penn ID, name, email, job code, organization, and supervisor.

You may see many rows with the same user information. Each row represents one item (course) assigned to the user. (For example, if a user is assigned a curriculum with 10 courses, the user's information will appear on 10 rows.)



This section contains the curriculum information, whether or not it is complete, and how many days are remaining to complete the course. Like user info, the curriculum info will also repeat if there are multiple items in a curriculum.

Please note: "Completion" of a curriculum requires that ALL items in the curriculum be complete. For example, the curriculum may show as not complete even if the item on the same row is complete.

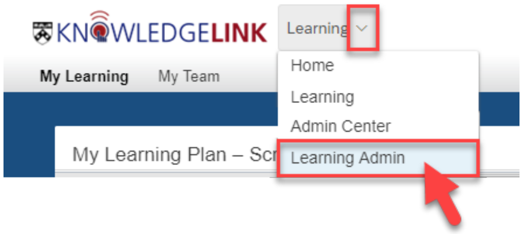
This section contains each individual item (course) that is assigned, whether or not it is complete, and the completion date.

Please note: "Completion" in these columns applies to the item, not necessarily the curriculum.

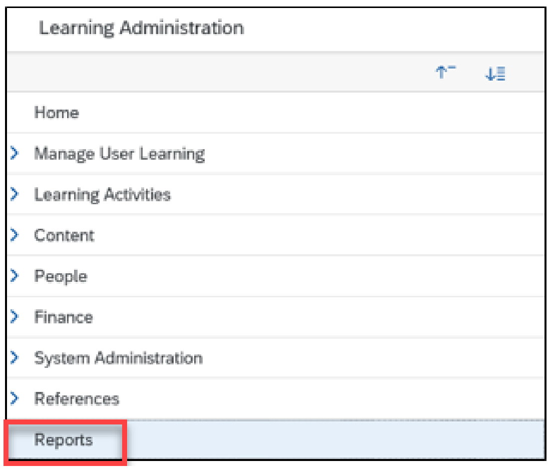
13. While viewing the report in Excel, the administrator can utilize Formulas, Filters, and Pivot Tables to analyze the information further. Refer to Excel Help for more information about these options.

How to Run the "PENN User Learning Plan by Item (CSV)" Report

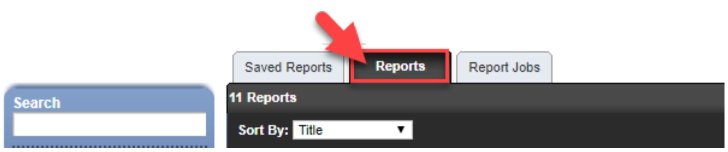
1. Log into Knowledge Link and, from the main menu, click the down arrow, then click **Learning Admin**.



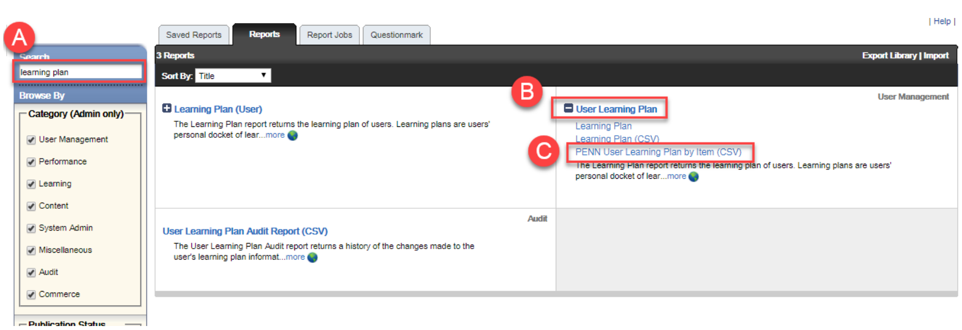
2. From the Learning Administration page, click **Reports**.



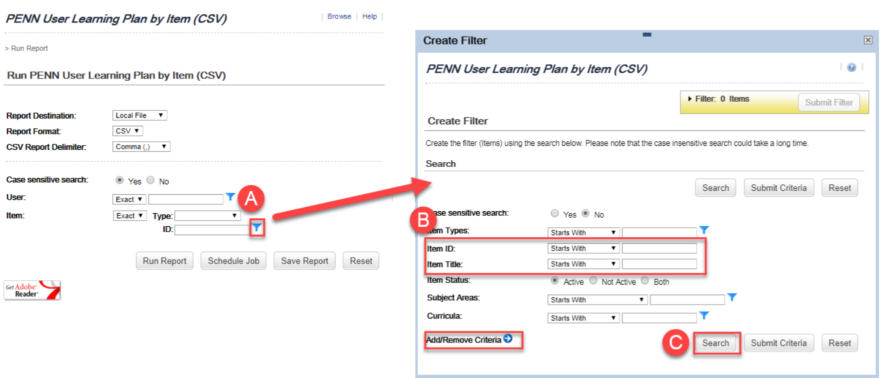
3. On the Reports page, select the **Reports** tab.



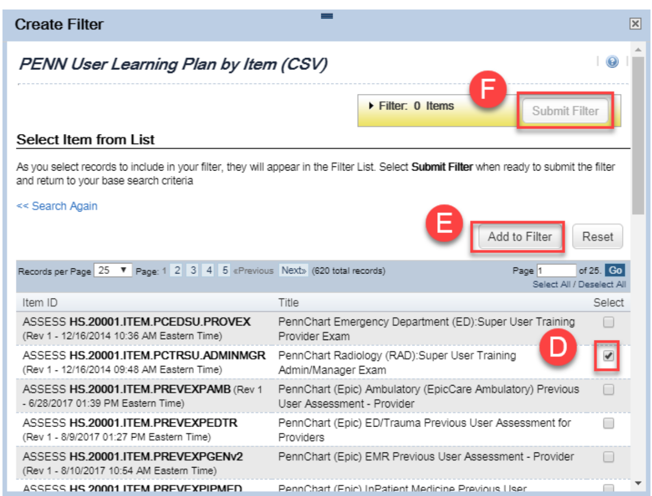
4. In the Reports window:
    A. Type "learning plan" in the Search box and press **Enter**.
    B. Click the plus (+) sign on the heading "User Learning Plan".
    C. Click the report title "PENN User Learning Plan by Item (CSV)".



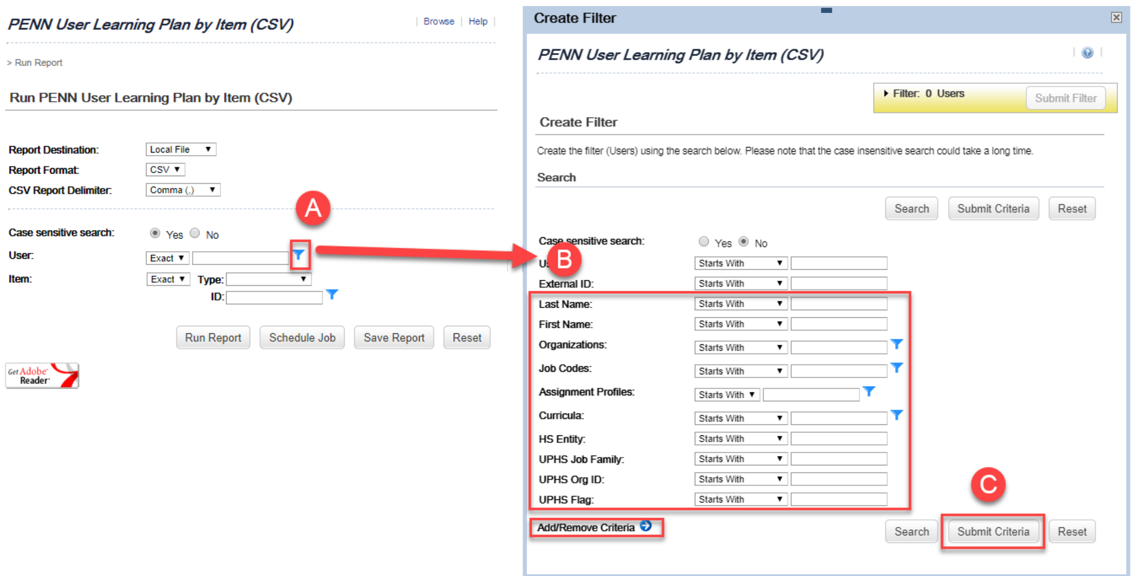
5. To define the course criteria for your report, follow the steps below:
    A. Select the blue filter button for **Item**.
    B. Enter criteria to search for your course. (Use the Add/Remove Criteria button to add or remove criteria for your search.)
    C. Click the **Search** button.



    D. Select the course (or courses) you want in your report.
    E. Click **Add to Filter**.
    F. Click **Submit Filter**.



6. If you want to report on all users who are assigned, skip this step. However, if you want to limit the report to specific users, follow the steps below:
    A. Select the blue filter button for User.
    B. Enter criteria for the users you want to include in the report. (Use the Add/Remove Criteria button to add or remove criteria for your search.) *For example: enter the job code and/or organization ID to report on all users that match those criteria.*
    C. Click the **Submit Criteria** button to report on <u>all users</u> that match your criteria.
    -- OR –
    Click **Search** to see a list of users that meet your criteria. Then you can select users individually and add them to the filter (similar to how you selected items in step 16, parts D-F).



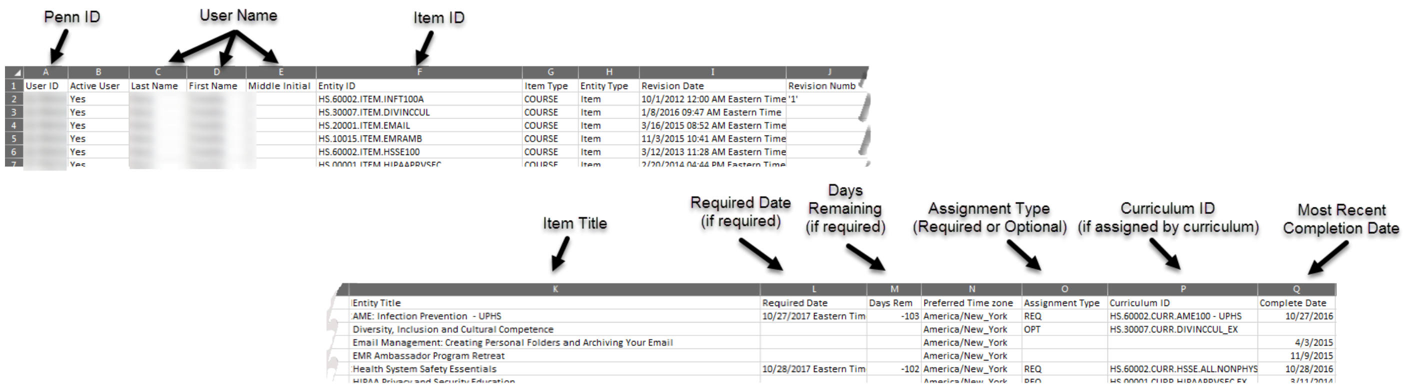
7. When all your criteria are selected, click **Run Report**.
   For help on other options, see the "Running Reports (including commonly used reports)" job-aid at [this location](#).

8. When the report finishes, it will download to your computer or you will be prompted to save and/or open the report (depending on your browser).

9. Locate the report on your computer and double-click to open it. The report will open in Excel.

10. Once the report opens, <u>immediately save it as an Excel document</u>. Select **Excel Workbook** in the "Save as type" box.

11. This report contains information about the user and the course(s) on their learning plan. The relevant columns in this report are:



Please note: Items are considered INCOMPLETE if the Days Remaining (column M) is a negative number OR Complete Date (column Q) is blank. If you see a negative number in Days Remaining AND a Completion Date, that means the course is supposed to be retaken periodically and the user has not retaken it yet (and is overdue).

12. While viewing the report in Excel, the administrator can utilize Formulas, Filters, and Pivot Tables to analyze the information further. Refer to Excel Help for more information about these options.