KNOWLEDGELINK

This job aid provides steps needed to generate and access reports in Knowledge Link.

Reporting Basics

- Report names that begin with "PENN" are customized for Penn Medicine. These reports have more information than standard reports.
- Reports that are labelled "CSV" are provided as Comma-Separated Values. These reports can be opened in Excel.
- Reports must be below 80 MB in size. If reports exceed 80 MB, the report will fail. It is important to use criteria and filters to limit the results of a report to keep it within this limit.
- Reports may be saved for quick retrieval and they may also be scheduled to be run periodically (and emailed to yourself or another user). *IMPORTANT: Please delete scheduled reports when you no longer need them.*
- Study and practice the steps in the document "How to Search and Filter in Knowledge Link" before proceeding. A basic understanding of searching and filtering is necessary before you run reports.

Common Reports

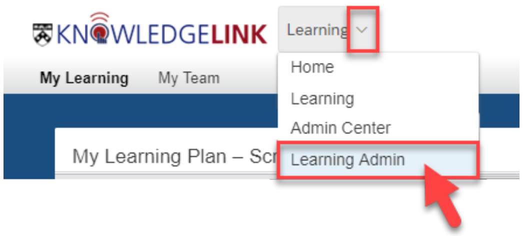
There are many reports in Knowledge Link. The following table lists the most commonly used reports. You can use the steps in this document to run most reports, including the first six reports listed below.

If you want to view…	**Run this report…**
A roster of enrolled students for a specific class. *The PDF version can be used as an attendance sheet.*	Class Roster PENN Class Roster(CSV).1
A list of all registrations for a specific class. *Includes enrolled, cancelled, no show, waitlist.*	Registration Statuses PENN Registration Status (CSV).2
A list of people who have completed a specific course. *Or a list of courses that have been completed by a specific person.*	Item Status PENN Item Status Report (CSV).2
A list of classes for specific dates, a specific instructor, and/or a specific location.	Learning Calendar Learning Calendar (CSV)
A list of classes and all data associated with each class, such as enrollment and waitlist status, dates, times, locations, instructors, etc.	Class Data Class Data (CSV)
The steps for the reports below can be found in the following job-aid: Compliance Reporting in Knowledge Link	
A compliance report (who is assigned, complete, not complete). *Only includes courses that have been assigned as part of a curriculum. It will not show courses that were assigned as an individual course.*	Curriculum Item Status PENN Curriculum Item Status (CSV).2
A compliance report (like above) but showing all assigned items (whether or not they are assigned by curriculum).	User Learning Plan PENN User Learning Plan by Item (CSV)

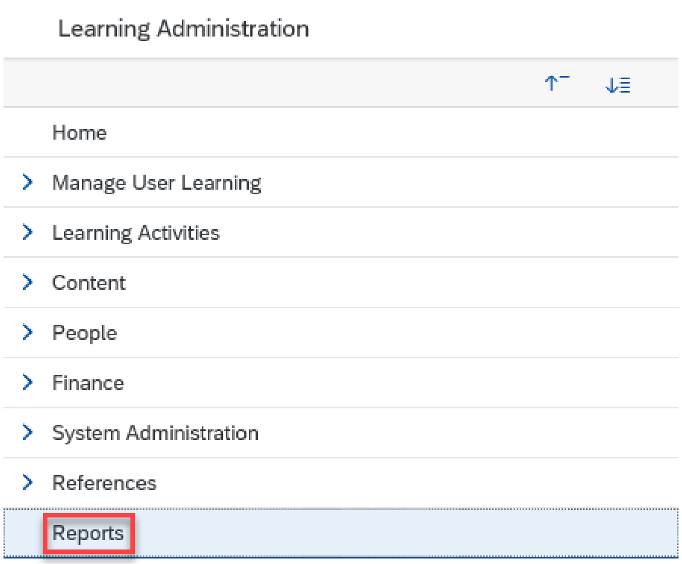
Running Reports

The steps below may be applied to most reports. The steps, criteria, and filters may vary depending on the report.

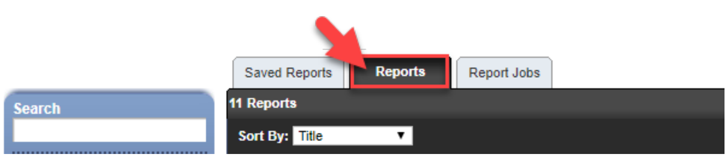
1. Log into Knowledge Link and, from the main menu, click the down arrow, then click **Learning Admin**.



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

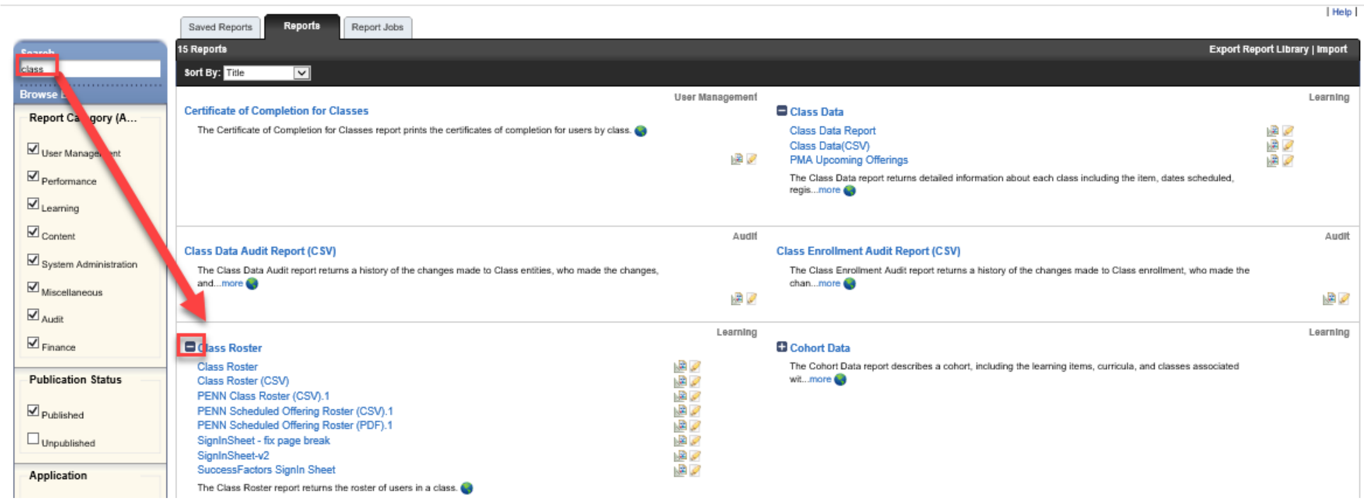


3. On the Reports page, select the **Reports** tab.



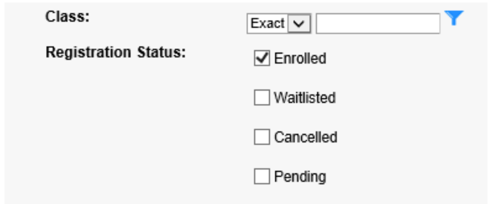
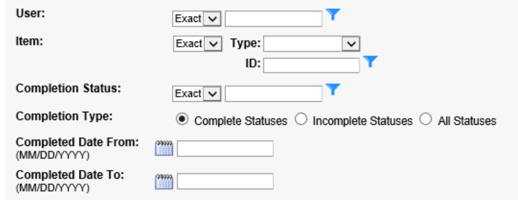
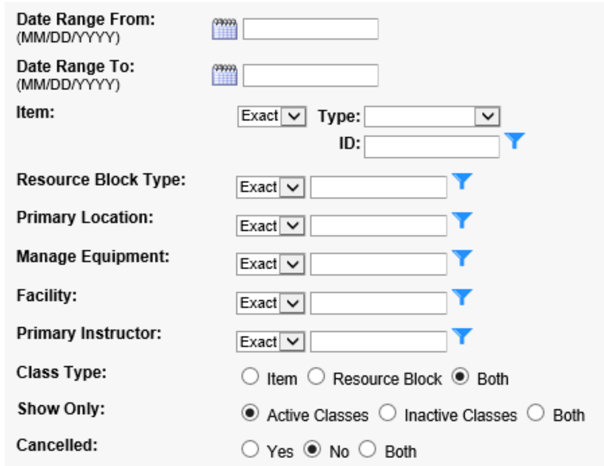
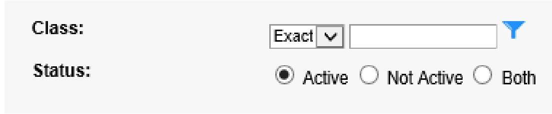
4. The categories along the left-hand side allow you to limit your search to specific types of reports. To ensure you are able to see all available reports, you can leave all these categories checked.

5. Type a search term in the Search box and press **Enter** or click **Submit**. Then click the plus (+) sign on the heading to see all available reports under that heading.



6. Click the name of the report to open it.

7. When you open a report, you will be presented with search options. The options for common reports are below.

Report Name	**Options to Define**
Class Roster PENN Class Roster (CSV).1	
Registration Statuses PENN Registration Status (CSV).2	
Item Status PENN Item Status Report (CSV).2	
Learning Calendar Learning Calendar	
Class Data Class Data (CSV)	

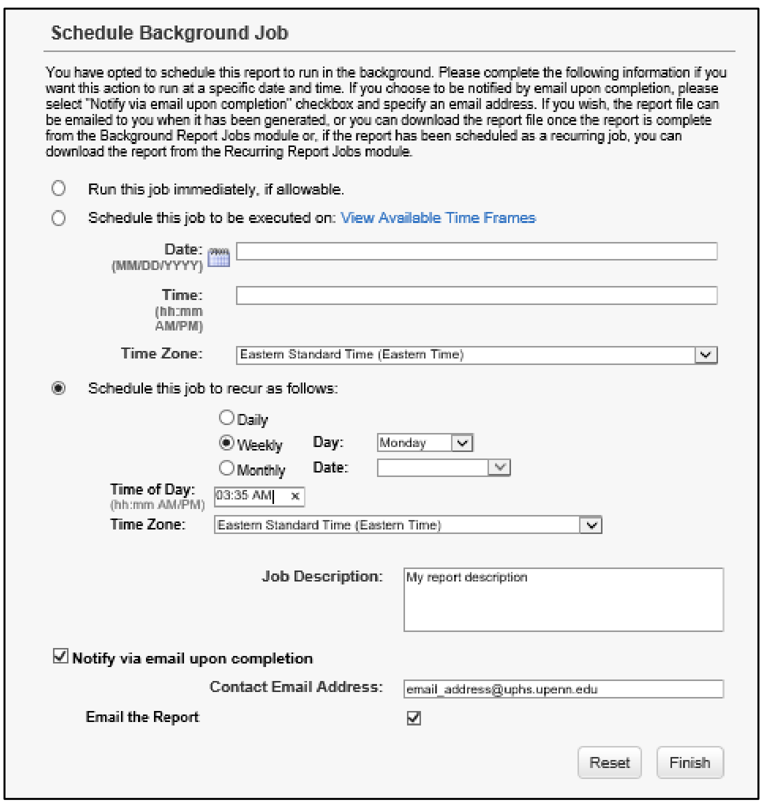
8. Define the criteria for your report. If exact terms or IDs are not known, use filters to search for specific values. See the document "[How to Search and Filter in Knowledge Link]" for further information.

9. When your criteria are selected, you have the following options:

Options may vary depending on the report.

Run Report	Click this button to run the report immediately. A new window will open and you will see messages regarding the status of the report.
Schedule Job*	Click this button to schedule the report for a specific time, or to recur on a periodic basis. See the next section to learn how to access saved and scheduled reports.
Save Report	Click this button to save your report to the “Saved Reports” tab. You will be prompted to enter a Report ID and Description. The Report ID is a unique ID that you define, and that allows you to update this report in the future. The Report ID cannot contain any spaces. *If you type the same ID as a previously saved report, your old report will be overwritten.* See the next section to learn how to access saved and scheduled reports.
Remove	This option only appears if you previously saved this report. Click this button to delete your saved report.
Reset	Click this button to reset all report options.

*Options and tips for Scheduled reports:



The screen to the left will appear when you schedule a report. You can run the report immediately, schedule it to run once on a specific day and time, or schedule it to run on a recurring basis (daily, weekly, or monthly).

TIPS:

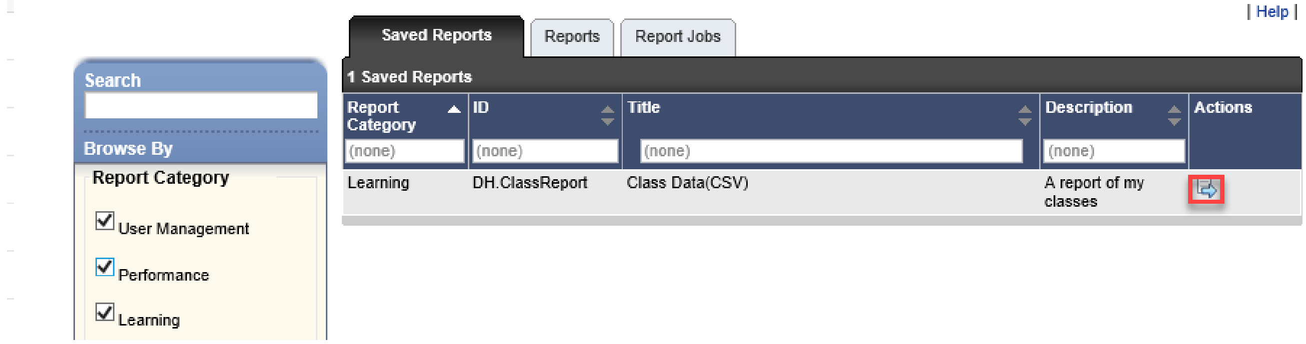
- Run the report at least once (using “Run Report” button) to be sure that it runs without failing.
- Save the report (using the “Save Report” button) so that you have a record of the criteria you used. (You cannot access criteria once the report is scheduled.)
- If the report is very large, use filters to define more specific criteria and reduce the size. Large reports can cause system issues for all users.
- When scheduling a recurring report, select a time that is not during regular business hours, and that is not likely to be common. (For example, 3:35 AM, 2:02 AM, etc.)
- You may email the report to yourself or someone else. *Only one email address may be placed in the email field*. To send the same report to more than one address, schedule the first report, then open your saved report and schedule it again (with a different address in the Email field).

10. When you run the report, it will download to your computer or you will be prompted to save the report to your computer (depending on your browser).

Viewing Saved and Scheduled Reports

For Saved Reports:

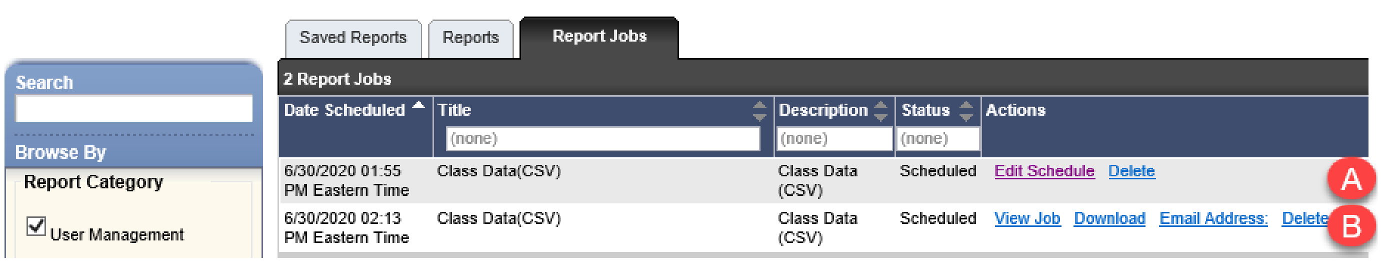
From the Learning Administration page, click the **Reports** button then click the **Saved Reports** tab to view all saved reports. The search box may be used to limit which saved reports are displayed. Click the **Actions icon** to open the report. Once the report is opened you may modify it, save it (overwrite the original), save it as a new report, and/or run the report.



For Scheduled Reports:

From the Learning Administration page, click the **Reports** button then click the **Report Jobs** tab to view all scheduled reports. The search box may be used to limit which scheduled reports are displayed. There are two types of reports you may see in this tab:

A. A report that is running on a recurring basis
B. A report that was run once



Your options for scheduled reports include:

- **View Job**: view details of the report job such as start time, end time, status, and filename.
- **Download**: download the report to your computer.
- **Email**: email the report to a specific person.
- **Delete**: delete the report.
- **Edit Schedule**: update the report schedule (for recurring reports).