



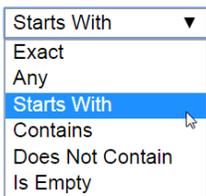
**PLEASE NOTE:** Knowledge Link is a shared system with the University of Pennsylvania. Most content is identified by an ID. You can identify university-owned content if the ID contains “UP” or “UNIV.” All UPHS content will contain either “HS” or “UPHS” in the ID. For example, the item IDs below indicate one course is a UPHS course and one is a University course:

COURSE HIPAA Refresher Training  
**HS.0001.ITEM.HIPAAREFRESH\_Y16** (Rev 1  
 - 7/25/2016 10:24 AM America/New York)

COURSE HIPAA-Support Services  
**UP.00000.ITEM.HIPAAASUPPORTSERVICES**  
 (Rev '1' - 10/1/2012 12:00 AM America/New York)

Keep this in mind as you are searching for and working with information in Knowledge Link. **Do not make any changes to University-owned content.**

When you search for any item in Knowledge Link you will have the ability to use specific criteria and a combination of various search fields to narrow down your results. The most common choices for entering search criteria are:



<b>Exact</b>	If you know the precise word or phrase you are searching for
<b>Any</b>	If you have a comma-separated list of IDs, Names, etc.
<b>Starts With</b>	If you know the first few letters/numbers of the record
<b>Contains</b>	If you know any part of the record word or phrase
<b>Does Not Contain</b>	If you want all records that do not contain a specific word or phrase
<b>Is Empty</b>	If you want all records where the specified field is empty

In addition, you will encounter the following options when searching for information:

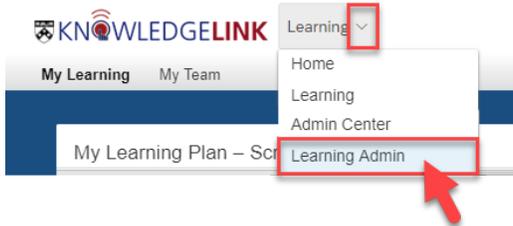
<b>Calendar</b>		Associated with the date field. Use it to select and populate the corresponding date field.
<b>Search</b>		Click to perform a search for the desired field.
<b>Filter*</b>		Click to create a custom search that will filter your results based on one or more criteria.
<b>Add/Remove Criteria</b>		Click to add or remove more search options on your search screen.
<b>Field Chooser</b>		Click to add or remove columns in your search results.

\* Filters require several steps to complete. A filter allows you to select criteria that a simple search will not allow. You can also combine filters to define more complicated criteria. For example, you can use a filter to search for all users in three different departments, at a specific entity, and with a particular job code.

## Searching

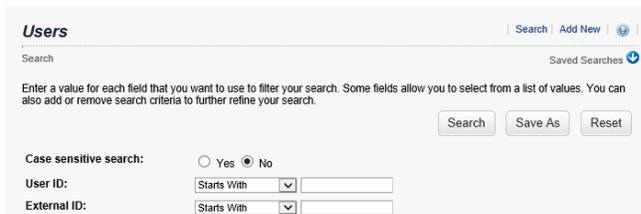
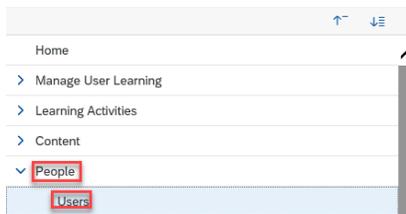
The following is a general overview of the steps involved in searching and saving searches.

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

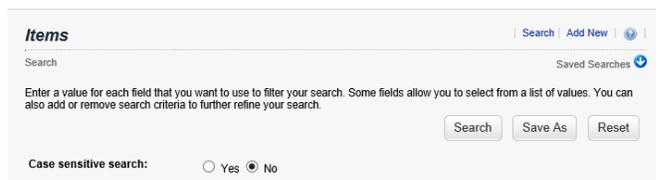
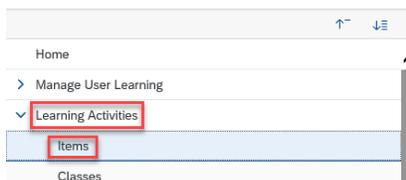


2. Go to the section of Knowledge Link where you would like to start your search. For example:

- People > Users
- Learning Activities > Items
- Learning Activities > Classes



↑  
OR  
↓



3. Fill in the text boxes to define your criteria and click **Search**. For example, if searching for a user:

**Users** | Search | Add New |

Search Saved Searches

Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.

Search Save As Reset

Case sensitive search:  Yes  No

User ID: Starts With

External ID: Starts With

Last Name: Starts With

First Name: Starts With

Role ID: Starts With

User Status:  Active  Not Active  Both

Organizations: Starts With

Job Codes: Starts With

HS Entity: Starts With

Add/Remove Criteria

Search Save As Reset

Note: if the search criteria you need are not shown, click **Add/Remove Criteria**, click a checkbox to add the criteria, and click **Select**.

User ID:

External ID:

Last Name:

First Name:

Role ID:

User Status:  Active  Not Active  Both

Organizations:

Job Codes:

HS Entity:

Add/Remove Criteria

Search Criteria

<input checked="" type="checkbox"/> Last Name	<input type="checkbox"/> Items Requests	<input type="checkbox"/> UPHS Job Code 2
<input checked="" type="checkbox"/> First Name	<input type="checkbox"/> Employee Statuses	<input type="checkbox"/> UPHS Job Code
<input type="checkbox"/> Middle Name	<input type="checkbox"/> Employee Types	<input type="checkbox"/> 150
<input checked="" type="checkbox"/> Role ID	<input type="checkbox"/> Job Locations	<input type="checkbox"/> Type of Supervisor
<input checked="" type="checkbox"/> User Status	<input checked="" type="checkbox"/> Job Codes	<input type="checkbox"/> Student Org
<input type="checkbox"/> Related Admin	<input type="checkbox"/> Alternate Job Codes	<input type="checkbox"/> Auxiliary Org
<input type="checkbox"/> Profile Status	<input type="checkbox"/> User Group ID	<input type="checkbox"/> Alternate Org
<input type="checkbox"/> Hired Date	<input type="checkbox"/> Assignment Profiles	<input type="checkbox"/> PennKey
After		

Select

4. Your results will display below the search fields. You have several options available.

Field Chooser

Download Search Results

Send Email Notification

Select All / Deselect All

Records per Page: 25 Page: 1 of 4 (86 total records)

User ID	User Name	Notify
59237752	SMITH,	<input type="checkbox"/>
14530770	SMITH,	<input type="checkbox"/>
80885359	Smith,	<input type="checkbox"/>

Page 1 of 4. Go

Use Field Chooser to add columns to your results and set the order of columns

Download your search results and open in Excel. (Includes all available columns, not just the columns visible on this page)

Change the records per page to show all records on the page

Click the link to open that record

Note that "Select All" will only select the records on this page

- 5. You also have the option to save your searches.
  - A. Click **Save As** to save the search. You will be asked to provide a search ID and description.
  - B. Find your saved searches at the top of the search screen.

**Users** | Search | Add New |

Search B Saved Searches

Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.

**Case sensitive search:**  Yes  No

**User ID:** Starts With

**External ID:** Starts With

**Last Name:** Starts With

**First Name:** Starts With

**Middle Name:** Starts With

**Role ID:** Starts With

**User Status:**  Active  Not Active  Both

**Profile Status:**  Active  Expired  Both

**Organizations:** Starts With

**UPHS Job Code:** Starts With

Add/Remove Criteria

A Save As

To learn how to perform advanced filtering, continue to the next section.

## Filtering

While searching or defining criteria for reports, you will often need to filter your results based on multiple criteria. The following is a general overview of the steps involved in using filters.

1. Click the blue filter icon for the field on which you wish to filter your results. (In this example, we are using the Job Code filter.) When you click the blue filter icon, a new window will open that allows you to perform a search.

A screenshot of a search criteria form. It includes fields for Case sensitive search (Yes/No), User ID, Last Name, First Name, Role ID, User Status (Active/Not Active/Both), Organizations, Job Codes, and HS Entity. Each field has a 'Starts With' dropdown and an input box. A blue filter icon is visible next to the Organizations and Job Codes fields, with the Job Codes icon highlighted by a red box.

2. Enter the search criteria in the fields, as desired, and click **Search**.

A screenshot of a 'Create Filter' dialog box for 'Users'. It shows a 'Filter: 0 Job Codes' indicator and a 'Submit Filter' button. Below, there's a 'Search' section with a 'Search' button, 'Submit Criteria' button, and 'Reset' button. The search criteria form is visible, with 'Case sensitive search' set to 'No'. The 'Description' field is set to 'Contains' with the value 'laboratory'. The 'Search' button is highlighted with a red box.

Note: If you want all results in the search, you may stop at this step and click "Submit Criteria" instead. For example, in the image seen here, if you click "Submit Criteria" then your search results will include **all users** whose job code description contains "laboratory."

If you only want to include certain job codes, then continue to the next step.

3. Click the box in the "Select" column for the items you wish to filter on, then click **Add to Filter**.

<< Search Again

Add to Filter   Reset

Records per Page	(14 total records)	Select All / Deselect All
Job Code ID	Description	Select
HS.A2414	PRN Laboratory	<input type="checkbox"/>
HS.A2436	PRN Laboratory Trainee	<input checked="" type="checkbox"/>
HS.CC2LABT	Laboratory Technician	<input checked="" type="checkbox"/>
HS.D07397	Manager Laboratory Operations	<input type="checkbox"/>
HS.D0903	Director Laboratory	<input type="checkbox"/>

4. The items you checked will be moved to the Filter at the top of the window.

**Create Filter**

*Users*

Filter: 2 Job Codes   Submit Filter

**Select from list**

As you select entities to include in your filter, they will appear in the Filter List. Select **Submit Filter** when ready to submit the filter and return to your base search criteria

- If you need to add more selections to your filter, click **Search Again** and repeat the previous three steps.
- When finished, click **Submit Filter**.
- You will return to your original search screen and the filter will now indicate how many job codes (or other criteria) are selected. To clear the filter and start over, click the white filter icon.

*Users*   Search | Add New | Filter Icon

Search   Saved Searches

Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.

Search   Save As   Reset

Case sensitive search:    Yes    No

User ID:   Starts With  

Last Name:   Starts With  

First Name:   Starts With  

Role ID:   Starts With  

User Status:    Active    Not Active    Both

Organizations:   Starts With    Filter Icon

Job Codes:   [2 Selected] Filter Icon

HS Entity:   Starts With  

Add/Remove Criteria

Search   Save As   Reset