

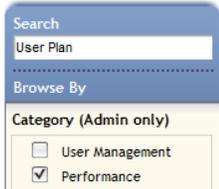
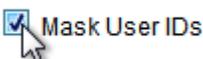
Notes

Be sure to check the date in the upper right hand corner to make sure you are using the latest version of this job aid.

## Running the User Plan Status Report

The **User Plan Status Report** shows the status of each employee's IDP plan. Because this report is usually run for an entire agency, it is important to know how to set the report parameters so that the report does not strain system resources and does not "time-out" trying to select each agency employee record. This job aid shows you how to define the plans you wish to see for the most current time period. You will see plans that are in Submit Pending Status, Active Approved Status, No Plan, and Draft/Rejected or Expired status.

Since this report is often run on a weekly basis to keep track of agency progress, the job aid walks you through the steps of creating a recurring report that will be emailed to yourself each week. The job aid also illustrates how to select a CSV format, compatible with Excel, so that you can sort the data by any of the fields provided.

Step	Activity	View
1.	From the AgLearn Admin Home Page, select <b>Reports</b> .	
2.	In the Search box, enter <b>User Plan</b> ; then select only the <b>Performance</b> category.	
3.	Click <b>Submit</b> .	
4.	Select the <b>User Plan Status Detail (CSV)</b> report.	
5.	To include AgLearn IDs in your report, clear the <b>Mask User IDs</b> box.	
6.	Click the User <b>Filter by criteria</b> icon.	
7.	In the <b>Domains</b> field, enter your Agency acronym.	

The CSV report format creates an Excel compatible output to download onto your PC. Data in this format can be manipulated and sorted in Excel.

It is critical to follow these steps to select your users. Do **not** try to select all of your users by name, as this will certainly "time out" your process and disable your ability to run the report.

Notes

If you do not see the Employee Types field, you will need to click the **Add/Remove Criteria** icon to add the field to your search screen.

## Running the User Plan Status Report

- 8.** Click the Employee Types **Filter** by criteria icon.

Employee Types: Starts With
- 9.** Change the Records per Page to **All**.
- 10.** Scroll down about 26 entries and select the **Federal** employee type

Contract	Contract	<input type="checkbox"/>
E	Federal	<input checked="" type="checkbox"/>
EXC-CON	Excepted - Conditional	<input type="checkbox"/>
- 11.** Click Add to Filter.

Add to Filter
- 12.** Click Submit Filter.

▸ Filter: 1 Employee Types Submit Filter
- 13.** Note that the Employee Types field now indicates **[1 Selected]**.

Employee Types: [1 Selected]
- 14.** Click **Submit Criteria**.

Submit Criteria
- 15.** In the **Expiration Date From** field, enter a date just prior to the end of the fiscal year.

Expiration Date From: (MM/DD/YYYY) 9/28/2014
- 16.** In the **Expiration Date To** field, enter a date just after the end of the fiscal year.

Expiration Date To: (MM/DD/YYYY) 10/03/2014
- 17.** Click **Schedule Job**.

**Note:** Do *not* click Run Report. Your report will strain system resources. A report capturing all agency data is too large to run during normal operating hours.

Schedule Job

To capture all plans that expire around the end of the fiscal year, we'll enter dates just before and just after September 30<sup>th</sup>.

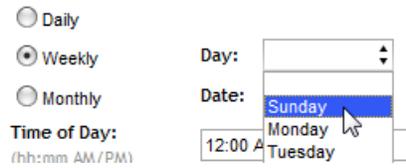
Notes

**Running the User Plan Status Report**

18. Click the **Schedule this job to recur as follows** option button.



19. Select the Weekly option; then select the day you wish to run the report.



You must select a time between 12:00 AM and 5:00 AM.

20. Enter the time that you wish to run the report.



Descriptions help to identify the report after it's created.

21. Enter a **Job Description**.



22. Check the **Notify via email upon completion** as well as the **Email the Report** checkbox. Be sure your correct email address is identified.



23. Click **Finish**.



You will receive a weekly email from [AgLearn.System@ocio.usda.gov](mailto:AgLearn.System@ocio.usda.gov). Attached to the email will be the CSV report with the most recent data.

24. Observe the message; then click the **Finished** button to complete the scheduling process.

