

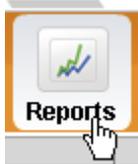
Notes

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.

Sending Outlook Reminders About IDPs

During the IDP year, you may wish to notify users or supervisors about plans in various statuses. The User Plan Status Detail report provides a listing of employees who have IDPs in each status. The CSV report also provides employees' email addresses, as well as those of their supervisors. Here's how to run and sort the report, then use the email addresses to send messages to these users or supervisors.

Step	Activity	View
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- | | | |
|-----------|--|---|
| 1. | From the AgLearn Admin Home Page, click the Reports button. |  |
|-----------|--|---|



- | | | |
|-----------|---|--|
| 2. | In the Search box, enter User Plan , then select only the Performance category. |  |
|-----------|---|--|



- | | | |
|-----------|-----------------------|---|
| 3. | Click Submit . |  |
|-----------|-----------------------|---|



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.

- | | | |
|-----------|---|---|
| 4. | Select the User Plan Status Detail-CSV report. |  |
|-----------|---|---|



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.

- | | | |
|-----------|--|---|
| 5. | Click the User Filter by criteria icon. |  |
|-----------|--|---|



- | | | |
|-----------|---|---|
| 6. | In the Domains field, enter your Agency acronym. |  |
|-----------|---|---|



Notes

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

Entering a date of 9/25/YYYY will return plans whose expiration date is after September 25th of the current cycle.

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

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- 7.** In the Organizational Unit field, change the drop-down list selection to Contains and enter a %.
- Note:** This step will consider only users with an organization (it will exclude contractors).

Organizational Unit:

Starts With

- Exact
- Any
- Starts With
- Contains
- Does Not Contain
- Is Empty

- 8.** Click **Submit Criteria**. Observe the User field now indicates criteria have been specified.

Submit Criteria

- 9.** In the **Expiration Date From** field, enter a current expiration date.
- Note:** In this example, the report will return all plans with an expiration date after September 25th of 2013.

Expiration Date From:

(MM/DD/YYYY)

- 10.** 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

- 11.** We'll schedule the report to run weekly. Click the **Schedule this job to recur as follows** option button.

Schedule this job to recur as follows:

- 12.** Select the **Weekly** option; then select the day you wish to run the report.

Weekly Monthly

Day:

Date:

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

- 13.** Enter the time you wish to run the report.

Time of Day:

(hh:mm AM/PM)

- 14.** Enter a Job Description.

Job Description:

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

Notify via email upon completion

Email:

Email the Report

Sending Outlook Reminders About IDPs

16. Click **Finish**.

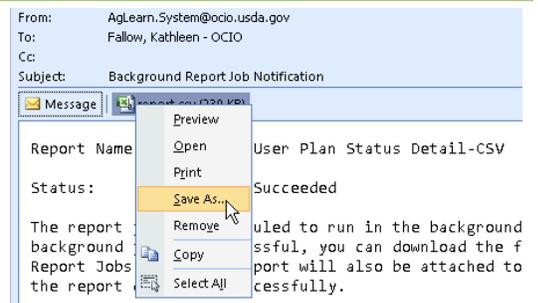


17. Observe the message; then click the **Finished** button to complete the scheduling process.

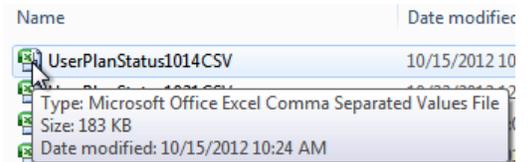


You will receive a weekly email from AgLearn.System@ocio.usda.gov. Attached to the email will be the CSV report with the most recent data.

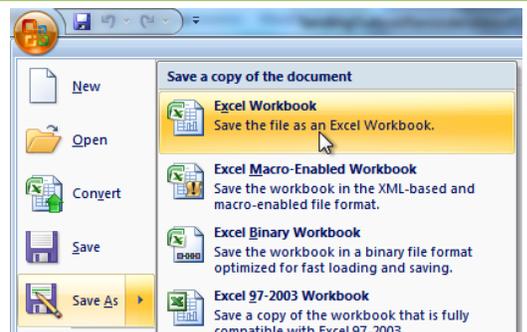
18. When you receive the email from AgLearn.System@ocio.usda.gov, save the attached CSV document.



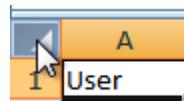
19. Double click the document icon to launch Excel.



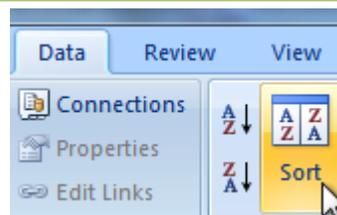
20. Save your file as an Excel Workbook.



21. Click the upper left corner of the spreadsheet to select all the data.



22. From the Data ribbon, click the **Sort** icon.

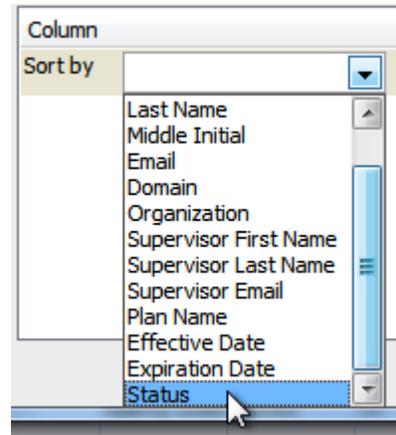


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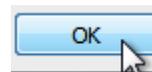
23. Select the **My data has headers** checkbox.



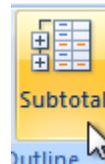
24. From the Sort drop-down list, choose **Status**.



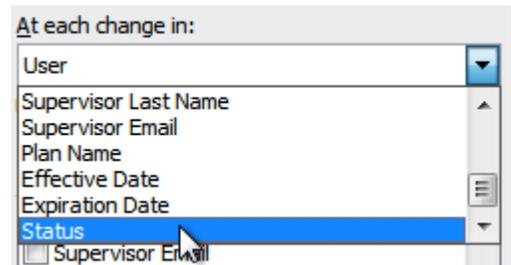
25. Click OK.



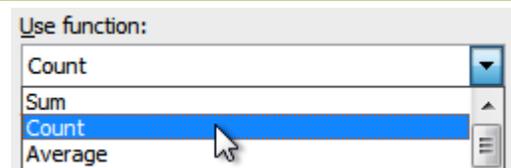
26. Click the **Subtotal** icon. This will enable you to get a total count of all users in each status category.



27. From the **At each change in** drop-down list, choose **Status**.

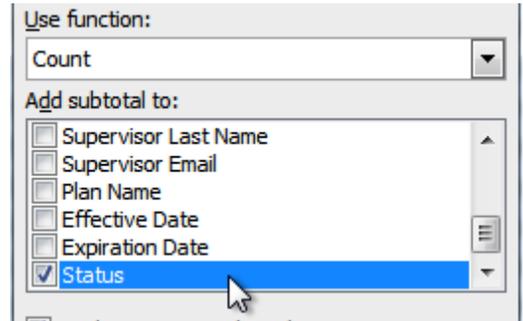


28. From the Use function drop-down list, choose **Count**.

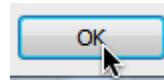


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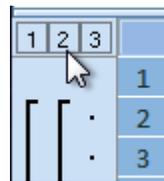
29. In the **Add subtotal to:** list, select **Status**.



30. Click **OK**.



31. On the far left side of the screen, click the 2 sub-total icon.



This report does not consider those who may have declined to create an IDP this year, or have submitted one on paper.

32. Note that your subtotals appear on the right side of your screen. You can now see exactly how many employees have IDPs in each status, including No Plan.

Approved Count	26
Draft/Rejected/Expired Count	107
No Plan Count	785
Submitted For Approval Count	69
Grand Count	987

33. Now it's time to select email addresses for those users you wish to notify. Click the 3 sub-total icon to expand your data.

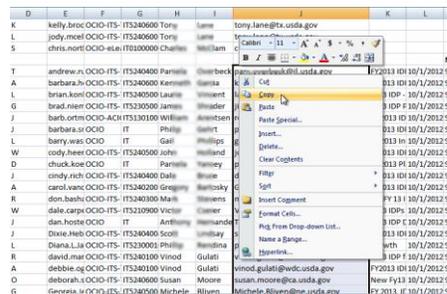


If the list of email addresses to be selected exceeds 50 addresses, complete the steps in phases, selecting only 50 names at a time.

34. For this exercise, we'll locate all users listed as having an IDP in Submit Pending (Pending Approval) status. Since we'll be sending an email to the supervisors of these users, we'll need to view and select all of the email addresses in **Column J** that have a status of **Submit Pending**.

G	H	I	J	K	L	M	N	
3-15-17324000 Tony	Lane	tony.lane@tx.usda.gov				No Plan		
3-15-17324000 Tony	Lane	tony.lane@tx.usda.gov				No Plan		
3-15-17324000 William	Arntsen	bill.arntsen@tx.usda.gov				No Plan		
No Plan Count								785
3-15-17324000 Pamela	Cherbonnet	pamela.cherbonnet@tx.usda.gov	PY2013 03 10/1/2012 9/30/2013 12:00 AM America/	Submitted For Approval				
3-15-17324000 Kenneth	Garcia	kenneth.garcia@tx.usda.gov	PY2013 03 10/1/2012 9/30/2013 12:00 AM America/	Submitted For Approval				
3-15-17324000 Laurie	Vincent	laurie.vincent@tx.usda.gov	PY13 IDP - 10/1/2012 9/30/2013 12:00 AM America/	Submitted For Approval				
3-15-17324000 James	Shander	jamie.shander@tx.usda.gov	PY13 IDP - 10/1/2012 9/30/2013 12:00 AM America/	Submitted For Approval				
3-15-17324000 William	Arntsen	bill.arntsen@tx.usda.gov	PY2013 03 10/1/2012 9/30/2013 12:00 AM America/	Submitted For Approval				
3-15-17324000 Phillip	Goettl	phillip.goettl@tx.usda.gov	PY2013 03 10/1/2012 9/30/2013 12:00 AM America/	Submitted For Approval				
3-15-17324000 Dale	Barkley	dale.barkley@tx.usda.gov	PY2013 03 10/1/2012 9/30/2013 12:00 AM America/	Submitted For Approval				
3-15-17324000 Gregory	Williams	gregory.williams@tx.usda.gov	PY2013 03 10/1/2012 9/30/2013 12:00 AM America/	Submitted For Approval				
3-15-17324000 Mark	Stevens	mark.stevens@tx.usda.gov	NY FY 13 10/1/2012 9/30/2013 12:00 AM America/	Submitted For Approval				
3-15-17324000 Victor	Cramer	victor.cramer@tx.usda.gov	PY2013 03 10/1/2012 9/30/2013 12:00 AM America/	Submitted For Approval				
3-15-17324000 Phillip	Goettl	phillip.goettl@tx.usda.gov	PY2013 03 10/1/2012 9/30/2013 12:00 AM America/	Submitted For Approval				
3-15-17324000 Scott	Limabay	scott.limabay@tx.usda.gov	PY2013 03 10/1/2012 9/30/2013 12:00 AM America/	Submitted For Approval				
3-15-17324000 Phillip	Goettl	phillip.goettl@tx.usda.gov	Goettl	10/1/2012 9/30/2013 12:00 AM America/	Submitted For Approval			
3-15-17324000 Vinod	Gulati	vinod.gulati@tx.usda.gov	PY13 IDP - 10/1/2012 9/30/2013 12:00 AM America/	Submitted For Approval				
3-15-17324000 Susan	Moore	susan.moore@tx.usda.gov	New FY13 10/1/2012 9/30/2013 12:00 AM America/	Submitted For Approval				
3-15-17324000 Michelle	Bliven	michelle.bliven@tx.usda.gov	Bliven	10/1/2012 9/30/2013 12:00 AM America/	Submitted For Approval			

35. Right-click the selection and choose **Copy**.



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- 36.** Launch Outlook.

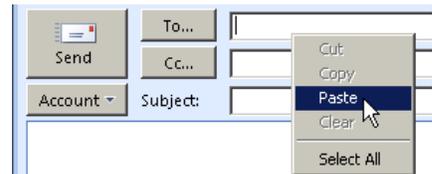


- 37.** Begin a new email message.

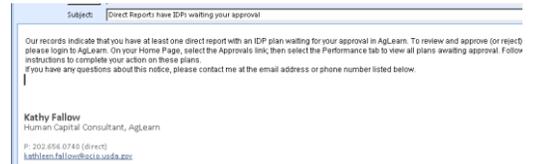


Outlook will insert the separators between addresses, though it may take a few seconds.

- 38.** In the To: address area, right-click and choose **Paste**.



- 39.** Enter a subject and text encouraging your users to take action on these IDPs. Suggested text appears at the end of this job aid.



- 40.** Click **Send**.



Recommended text for email message to supervisors with plans needing approval:

Our records indicate you have at least one direct report with an IDP waiting for your approval in AgLearn. To review and approve (or reject) this plan, please login to AgLearn. On your Home Page, select the Approvals link; then select the Performance tab to view all plans awaiting approval. Follow the online instructions to complete your action on these plans. If you have any questions about this notice, please contact me at the email address or phone number listed below.

Recommended text for email messages to users with Draft plans needing approval.

Our records indicate you have at least one IDP in Draft status in AgLearn. Please submit this plan to your supervisor for approval so you can begin tracking your goal progress. If this plan is simply a copy of a plan already submitted, please login to AgLearn and delete this plan so our reports no longer identify you as delinquent in creating your IDP.

If you have any questions about this notice, please contact me at the email address or phone number listed below.