April 20, 2011

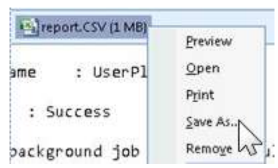
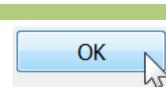
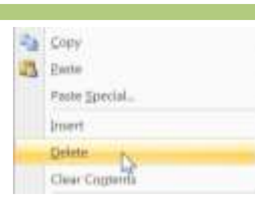
Notes

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.

Analyzing User Plan Status Report CSV Files

CSV data from both the **User Plan Status Legacy Report** and the **User Plan Status Report** show the status of each employee's IDP plan. Please refer to the job aid titled **Running the User Plan Status Report** or **Running the User Plan Status Legacy Report** to learn how to create the report data. Those job aids shows you how to create a weekly recurring report that is emailed to your USDA email account.

Output from the Legacy Report includes the subtotals of counts for each of the IDP statuses. The other report does not include these subtotals. This job aid walks you through the steps of organizing the data in Excel so that you can identify which users have plans in a Submit Pending or Active Approved status and which users have still not created a plan or have yet to submit it to their supervisor for approval.

Step	Activity	View
1.	Open your email from AgLearn.System@ocio.usda.gov with the title **Recurring Report Job Notification**.	
2.	Right-click the attachment, choose **Save As**, then save the file to your PC.	
3.	Locate the file on your computer, then double-click the file to launch Excel and open the file.	
4.	From the **Data** ribbon, click the **Sort** icon.	
5.	From the Sort by drop-down list, choose **Organization ID**.	
6.	Click **OK**.	
7.	Scroll down to the bottom of the data. Select all the records that have no ORG ID. Right-click the selection and choose **Delete**.	

Users with no ORG ID are not USDA employees and should not be included in your report.

Notes

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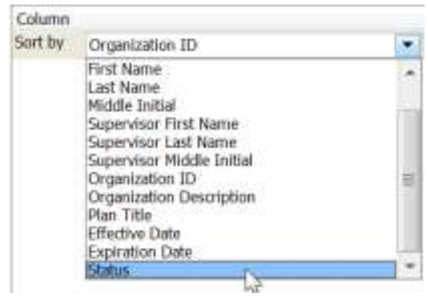
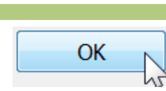
8. From the **Data** ribbon, click the **Sort** icon.

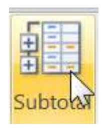
9. From the Sort by drop-down list, choose **Status**.



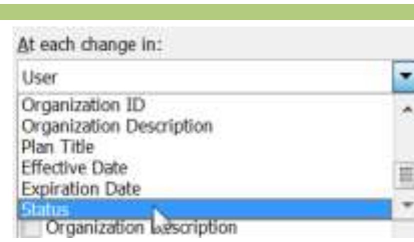
10. Click **OK**.



11. Click the **Subtotal** icon.

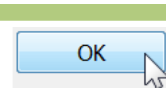


12. From the **At each change in** drop-down list, choose **Status**.



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

14. Click **OK**.



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

16. Note that your subtotals appear on the right side of your screen.

Approved Count	47
Draft/Rejected/Expired Count	109
No Plan Count	2495
Submitted For Approval Count	25
Grand Count	2676